

Regional Project Management Business Process

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1 February 2000

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1. **Purpose:** Within South Pacific Division, each individual District and the Division office use different processes, tools, and reports to execute our programs. To better operate as a Regional Business Center, standardization of basic management strategies needed to be achieved. A Process Action Team (PAT) was created using District representatives with the goal of developing a set of project management and workload management processes, tools, and reports that can be implemented across the South Pacific Division. The team's primary focus is directed towards management, execution and delivery of projects to our customers – a Regional Project Management Business Process (RPMBP). Through development of the RPMBP, we expect to achieve increased execution capability and flexibility, improved communication between the Districts and the Division office and create opportunities for cost reductions.
2. **RPMBP Development:** The RMB established a Process Action Team of seven District representatives to develop the RPMBP. Several of the Districts have independently developed and have implemented to various degrees their own Project Management Business Processes. These efforts were used as a basis for the RPMBP. Objectives of the RPMBP include: common project management processes, common use of PROMIS and CEFMS for management of ALL work, common reports including data rollups across Districts, ability to forecast total Division workload, ability to level resources across Districts, and ability to measure success of project delivery to our customers. The team's efforts focused on three major areas, Standard Operating Procedures, a Standard Reporting System, and a Regional Database.
3. **Standard Operating Procedures:** Standard Operating Procedures necessary to assure common project management activities and data development across the Division include:
 - SOP 1 District Acceptance and Assignment of Work
 - SOP 2 Project Initiation in PROMIS and CEFMS
 - SOP 3 Team Establishment and Team Processes
 - 3A Project Manager/Team Members/ Section Chief Roles and Responsibilities
 - 3B Outreach Account Manager/Project Manager/ Program Manager Roles and Responsibilities
 - 3C Project Manager/Construction Manager Roles and Responsibilities
 - 3D RMB/PRB Roles and Responsibilities
 - SOP 4 Use of PROMIS and NAS Minimum Requirements
 - 4A WBS Standard Minimum Templates and Milestones

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- 4B Resource Estimates Minimum Requirements
 - 4C NAS Scheduling Minimum Requirements
 - 4D Outyear/Unfunded/Unknown Work Minimum Requirements
 - 4E Project Management Plan Minimum Requirements
 - 4F PROMIS for Unique Programs
 - SOP 5 PROMIS/CEFMS Interface
 - SOP 6 Regional Extract Database
 - 6A Funds Distribution
 - 6B Scope of Services for Workload Assignments
 - SOP 7 Project Management Using Earned Value Analysis
 - SOP 8 Workload Analysis for FY, BY, BY+1
 - SOP 9 Minimum District Reports
 - SOP 10 Minimum Regional Reports
4. **Standard Reporting System and Regional Database:** With access to all South Pacific Division PROMIS and CEFMS databases, standard reports and a reporting system are being designed and implemented. Reports are being generated to meet the needs of Project Management Teams, Section Chiefs, District Management, Regional Management, and Customers. The Regional database and tools will be delivered to the users' desktops through the Corpsnet and a web browser. The standard reports, menus, procedures, and functions to extract and format the report data will be on a web server. Data extracted for the reports will be “live” PROMIS data and nightly downloaded CEFMS data.
5. **Recommendations and Implementation:** Implementation is not a simple action. It involves a cultural change in the Districts and the Division in the way we do business. Constant and persistent management attention is required to make this a successful initiative. The Process Action Team has created the groundwork for implementing the RPMBP for South Pacific Division. On 11 Jan 2000, the RMB, SPD staff, and the Districts agreed on the concepts and the draft SOPs presented. District Commanders will now have to lead their organizations in the development and execution of District RPMBP Implementation Plans. The plans will include, over the next year, iterative cycles of:
- RPMBP Concept Training and Communication
 - PROMIS User “How To” Training
 - Workload Management “How To” Training
 - Project Team Meetings and Data Development

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PROMIS Data Loading, Review, and Verification

Organization Workload Analysis and Resource Leveling

District Analysis of Workload, Priorities, and Resource Conflict Resolutions

RMB Workload Analysis and Regional Resource Leveling Actions

By the end of FY 2000, all Districts will have an Implementation Plan in place and the first iterations of data for ALL work will be entered in the PROMIS database for FY 2001 and 2002 execution. In March 2001, the Regional Management Board will be using data from the reporting system to make active workload and resource decisions. By March 2001, iterations of project data development, workload and resource analysis will reflect accurate forecasts for FY 2002 manpower requirements and will be used for FORCON and CERAMMS data queries. By March 2001, iterations of project data and workload analysis will reflect accurate execution plans for FY 2002 and budget requirements for FY 2003.

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INTRODUCTION

1 February 2000

1. **Introduction:** A Project Management Business Process enhances service to Corps customers, provides a focal point for interface with customers and internal organizations, places emphasis on completing projects and programs rather than just individual products or phases, and enhances USACE's reputation as the world's premier engineering organization. This document introduces the Regional Project Management Business Process (RPMBP) providing the tools and direction necessary for the district and division offices in South Pacific Division to meet those goals as outlined in ER 5-1-11.
2. **RMB Regional Action Directive 99-3:** The tasking to develop this document came from the realization and acceptance of the RMB that a problem exists for the Division to function as a Regional Business Center. The SPD Regional Business Center lacks common processes and tools to manage workload and resources across the Division. Common business processes down to the Section level are required for regional management and will improve mission execution. The intent of this Process Action Team is to provide a common business process allowing project management and cross-leveling of resources across districts. The directive is attached.
3. **Team Process:** A seven-member taskforce was assembled from the four districts. Team members have direct experience in the functional areas of Project Management, Program Management and Information Management. The group includes members who are CEFMS and PROMIS trainers and subject matter experts. Most have hands-on experience in CEFMS and loading and maintaining PROMIS data. Of the four districts, two have spent significant amounts of time creating PMBPs and tools with which to operate. The team met for a week each month to develop and modify the processes and tools described herein using existing PMBPs and tools from the districts as a starting point.
4. **Facts, Assumptions and Criteria:**

Facts: SPD has two large districts and two small districts. Two districts have well-developed PMBPs that have been implemented to higher levels of success. PROMIS usage in the PMBP districts is higher than the others. One district is able to load level its entire program throughout the fiscal year using PROMIS and associated reports. Project Management, as directed in ER 5-1-11, is implemented to a large degree in all districts. The Division has not been trained in PROMIS and does not use any of the reporting systems available: PPDS, PROMIS reports, Cooperative Reports Repository, with the exception of MILCON CMR. The Division therefore uses manual entry or calls the districts frequently for basic project and programmatic information and status. RMB meetings consist of reviewing strategic level efforts with regional decision-making left up to the individual DPMs in their districts. District-to-district assistance is arranged on a project-by-project basis between DPMs. No Division workload forecasting or resource analysis beyond the macro level can be achieved for lack of data.

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Assumptions: Resources are loaded to a Section level through the BY+1 or the phase, whichever is longer. A common set of milestones exists for each program and is entered through the project lifecycle. Data is loaded only once. Districts and Division will use the process and tools.

Criteria: The processes and tools must have the ability to analyze workloads for all work performed by the Districts. The tools are useful for Section Chiefs for resource leveling. Common reports are visible and available to all.

5. **Alternatives, RPMBP and Tools:** The alternatives analyzed for the RPMBP were broken down into process alternatives and tools alternatives. The Process Analysis developed around the current practices used in each of the districts and division for management of projects, programs, and organizational resources. The Tools Analysis examined alternatives to optimize speed, visibility, and commonality of information.

Projects: The team agreed that common to all districts was the concept that the PM would manage using a schedule and budget developed in coordination with the project team and team members' respective section chiefs: the PM would create the basic Statement of Work (SOW), schedule, and cost and request review by the Team Members and Section Chiefs. The Section Chiefs would respond to the PM with their interpretation of the project requirements. The PM and Section Chief would then reach agreement on SOW, schedule, and cost. Periodically, the PM and project team would revisit the SOW, schedule, and cost and revise them. The team interpreted "periodically" to be "monthly" for Schedule and "quarterly" for SOW and Cost. The districts used various tools for communication of the schedule and budget, for example, PMP, Outlook, verbal, Scope of Services, PROMIS, Service Requests, and reports but the core concept of periodic coordination of PM with Org Chief and team members formed the basis for the RPMBP.

Programs: For the programmatic analysis, the processes were quite different ranging from CEFMS and PROMIS reports to Excel spreadsheets. Adhering to the criteria for data entered once, the team favored using existing database systems by analyzing the total program funding in CEFMS and as needed comparing it to the data that was entered in PROMIS via a reporting spreadsheet. The spreadsheet report was interpreted to be the vehicle by which the district or division would compare data after being automatically loaded from the databases.

Organization: The section resource analysis examined the methods or lack of methods for tracking current usage or planned usage of resources. In most cases, a system of examining past trends and comparing bodies-on-board to past trends and extrapolation was the method in use. Forecasting was limited to current projects with extrapolation of the past trends for new and unfunded work. The processes in the districts were largely a spreadsheet exercise with little commonality and few feedback loops to the program and project levels. Two of the districts did have information from PROMIS which showed fiscal year work by organization. The team looked at the best ways to access the data and determined that by just automating the process and creating a common viewing area, the current processes would still be valid.

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The benefit would be to streamline the existing process by increasing visibility of the data and minimizing the data sources.

Tools: The greatest discussion concerned common tools. The data was located remotely in PROMIS and CEFMS, or locally in the district. There was no common process for one district to view another district's information for shared projects, or for the division to view any district's data. Speed, visibility, and commonality were critical.

- Step 1:** The first step was an information needs analysis. Team members queried District personnel at all levels - PMs, Programs folks, Organization Chiefs, Team Members - to develop a list of data or reporting needs. In the first team meeting at SPD, the Division counterparts were interviewed to determine similar needs. Three basic questions were asked: what do you do now, how do you obtain the information you need to do what you do now, and how do you see your job changing in the future. From these interviews a list of data and reports was compiled and compared to needs expressed in the Districts. The two were very similar.
- Step 2:** The second step was determining whether the data required by the information analysis existed in the current systems. PROMIS and CEFMS could contain the majority and with other systems running in an Oracle Database the team could even meet other data requirements using RMS, REMIS, FUDSMIS, and others.
- Step 3:** The third step was deciding if all information requirements could currently be viewed using existing systems. Financial and Accounting information for Programmatic purposes already existed in CEFMS. Project related information existed in CEFMS and PROMIS and was largely visible from the existing viewers – PPDS, CEFMS reports, PROMIS reports, Cooperative Reports Repository. The section resource data was the problem. While reports existed for CEFMS on a current year programmatic level, none existed for the Project level or the section level, for planning purposes nor on a Division-wide workload level. Using the list of reports from the information needs analysis, the team matched the list to existing reports at the districts. The remainder required a separate viewing mechanism.
- Step 4:** The fourth step was identifying the alternatives for the new mechanism. Ideas included direct query reports on the existing databases, construction of a single regional database for direct query, and construction of multiple local databases at each district. A web-based viewer was unanimously chosen to allow commonality of reports and data and to bypass firewall issues. With long discussion, a single Regional database replicating multiple districts' information from the remotes was selected to speed up queries and reduce maintenance. The single database also minimizes multiple logins and allows for a single query site.

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6. **Recommendation:** Using the existing SOPs from the two PMBPs, the team has created a unified approach to the PMBP, such that personnel from any component in the Division can work with sister organizations without learning a new process. The web site design with the local Regional database allows for fast, common viewing of data to coordinate resource sharing more efficiently. Similar loading processes for PROMIS and CEFMS allow analysis and planning using an apples-to-apples comparison of data.

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IMPLEMENTATION MEMORANDUM #01

Subject: District Acceptance and Assignment of Work

1 February 2000

1. **Purpose/Scope:** The purpose of this memorandum is to define the steps required for the individual Districts to assess their capability to accept new work from both existing and new customers and how to assign accepted work. This memorandum also describes how the individual Districts will assign work that Headquarters and Congress have directed them to perform.
2. **Responsibilities:** Employees who receive inquiries for potential new work from an existing customer are responsible for notifying the appropriate Program Manager. Employees who receive an inquiry for potential new work from a new customer are responsible for notifying the Outreach Director/Coordinator who, in turn, is responsible for notifying the appropriate Program Manager. The Program Managers, acting on behalf of the Deputy for Programs and Project Management (DPM) (may be the same), are responsible for analyzing their current workload (when requested to take on new work), determining capability, and, if new work is accepted, for assigning a Project Manager. (A list of the Programs and Program Managers is shown below as Table 1-1.)
3. **Procedures:** Three procedures define how work is accepted and assigned in each District: one for new work directed by Congress and Headquarters, one for new work proposed by an existing customer, and one for new work proposed by a new customer.
 - a. **New Work Directed by Congress or Headquarters:** This new work can be derived from several programs including the Military Construction (MILCON) Program, the General Investigation/Construction General Program (GI/CG), and the Formerly Used Defense Sites (FUDS) Program. Congress or Headquarters generally directs this work to the appropriate Program Managers for these programs. The District then assigns a Project Manager utilizing the procedures outlined in RPMBP SOP #03, Project Team Establishment and Team Process.
 - b. **Potential New Work from an Existing Customer:** Any employee in a District can be a Point of Contact (POC) for potential new work from an existing customer. Any employee who is approached about new work from an existing customer shall obtain as much information as he/she can about the work. That employee shall then forward that information and customer POC information to the appropriate Program Manager (**Table 1-1**) or Outreach Coordinator. The Program Manager shall evaluate the District's ability to accomplish the work using the process Flow Chart shown in Figure 1. If the District accepts the work, the Program Manager shall assign a Project Manager who will then proceed to build a project team in accordance with RPMBP SOP #03, Project Team Establishment and Team Process. If the Program Manager determines he/she cannot accept the new work, the decision-making process outlined in the attached flow chart (**Figure 1-1**) shall be followed.

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IMPLEMENTATION MEMORANDUM #01

Subject: District Acceptance and Assignment of Work

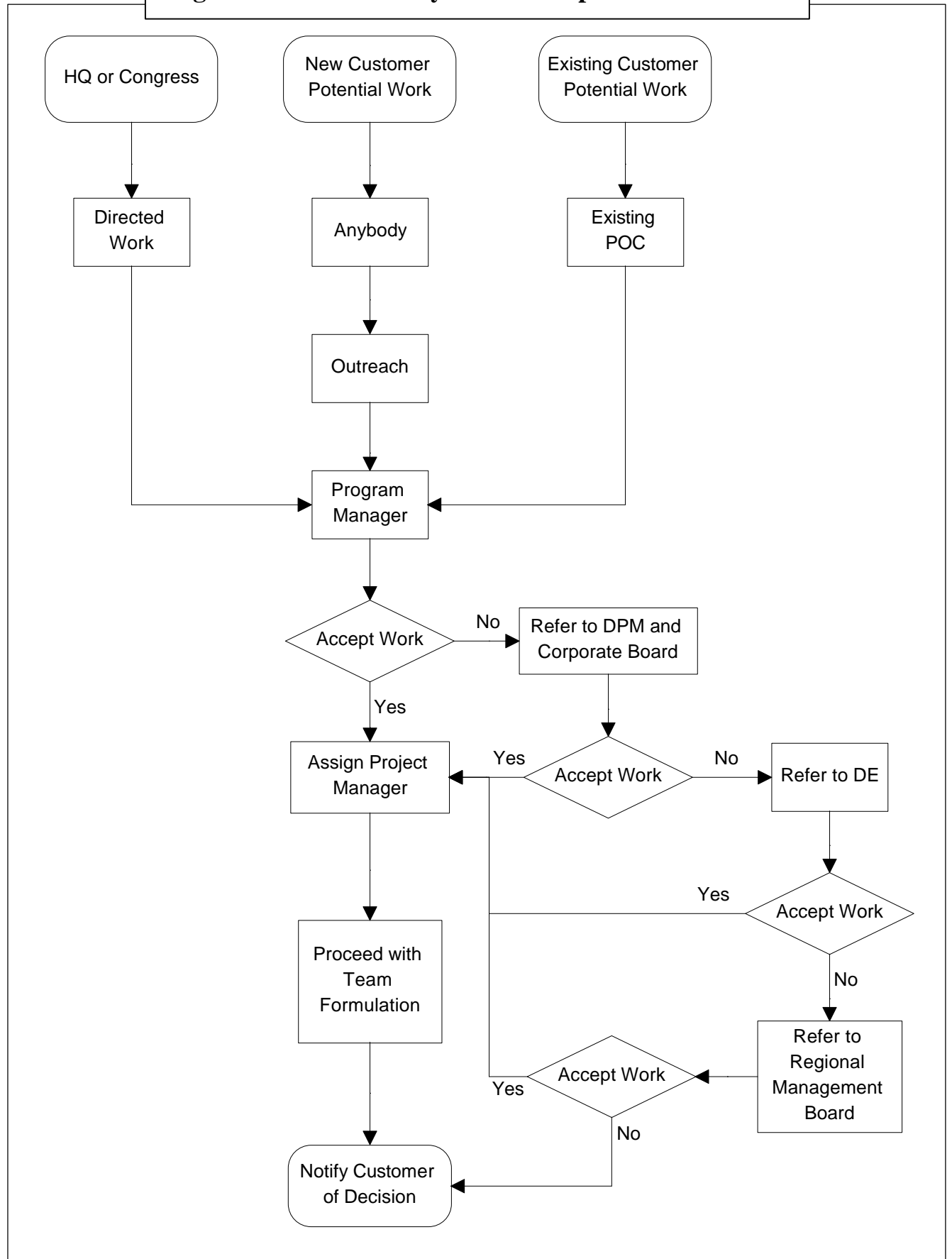
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- c. **Potential New Work from a Potential New Customer:** Any employee in the District can be a POC for potential new work from a potential new customer. Any employee who is approached about new work shall obtain as much information as he/she can about the work. That employee shall then forward that information and customer POC information to the Outreach Director/Coordinator. The Outreach Director/Coordinator will coordinate with the appropriate Program Manager and the PRB to reach a determination on the District's ability to accomplish the work and/or the desire to accept the work in accordance with the process Flow Chart shown in Figure 1. If the District accepts the work, the Program Manager shall notify the Outreach Director/Coordinator and assign a Project Manager, who will then proceed to build a project team in accordance with PMBP SOP #03, Project Team Establishment and Team Process. Depending on the size of the work from the new customer, the Outreach Director/Coordinator shall determine if an Account Manager should be appointed and if an Account Management Plan should be developed. If the Program Manager determines that he/she cannot accept the new work, he/she shall immediately notify the Outreach Director/Coordinator who will in turn coordinate with the PRB.

4. The Process Flowchart is attached as Figure 1-1.

Table 1-1. List of Programs and Program Managers

	Civil Works	Military	SFO	HTRW	Outreach
SPA	Bob Meehan	Bob Meehan	Pete Doles	Cheryl Buckel	Kris Schafer
SPD	John Tsingos	Steve Miller	John Davidson	Tony Mei	Carolyn Buckles
SPK	Johnnie Mack	Linda Finley-Miller	Harvey Jones	Sannie Osborn	Nicole Gauthier
SPL	Jim Crum	Glenn Arakaki	Dave Taylor	Debbie Castens	Geoff Chatfield
SPN	Arijs Rakstins	NA	Arijs Rakstins	NA	Eric Bluhm

Figure 1-1. Preliminary Work Acceptance Flow Chart



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IMPLEMENTATION MEMORANDUM #02

Subject: Project Initiation in PROMIS and CEFMS

1 February 2000

1. **Purpose/Scope:** The purpose of the memorandum is to establish initial procedures for entering a project into the PROMIS and CEFMS databases. These procedures are required before a Project Manager (**PM**) can begin creating the project Work Breakdown Structure (WBS), setting a schedule, and entering resource estimates (for example, cost estimates).
2. **Responsibilities:** The individuals identified within the District as PROMIS System Administrators (**SA**), usually the Budget Analysts, are responsible for registering a project in the PROMIS database. Budget Analysts are usually responsible for creating initial work items in CEFMS. The **PM**, in conjunction with Budget Analysts and other Team Members, is responsible for entering additional project information once the project is registered in PROMIS.
3. **Procedures:**
 - a. When the District determines that a project will be funded, the first step is for the Budget Analyst to enter the CEFMS database and create a project work item. The **SA** will enter this project work item into the PROMIS database through the System Administration module (step b). The **SA** will make this work item the parent for all additional work items created in CEFMS.
 - b. To add a project to the PROMIS database, the **SA** activates the PROMIS System Administration module and enters the required information. The documents that authorize project work contain most of the information necessary to register a project in PROMIS. Examples of authorizing documents include the Funding Authorization Document (FAD), Work Allowance, Work Authorization Document (WAD), Design Directive, and Customer Orders. The **SA** then enters information that includes the project name, whether it's reportable to Headquarters/Major Subordinate Command HQ/MS, CWIN Number, HQ External Reference/Project Reference, CEFMS Work Item Code, Organization (of Project Manager), Project Manager, Project Type, Project Funds Type, and Project Sub Type. The System Administration utility automatically generates a project number. This number is assigned to the project when the registration is complete and the information is added to the PROMIS database.
 - c. Following registration, the **PM** or the Budget Analyst can access the new project to enter additional information. Project data requirements unique to the mission (e.g., Civil, Military, or HTRW) are displayed in the Project Identification dialog. While each mission is different, the common input dialog boxes here include Comments, Customer Information, Location (customer/project), Detail (additional project), Authority (e.g., Congressional – Civil only), and Team Assignment.

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IMPLEMENTATION MEMORANDUM #03

Subject: Team Establishment and Team Processes

1 February 2000

1. **Purpose/Scope:** The purpose of this memorandum is to establish the procedures for creating and managing project teams, developing and coordinating project work scopes, setting schedules, and establishing resource estimates and plans. These procedures are applicable after a new project or phase has been identified, a Project Manager (**PM**) has been assigned, and the project has been registered in PROMIS.
2. **Responsibilities:** The **PM** is responsible for initiating and managing the team process. The project **Team Members** are comprised of technical disciplines, their immediate supervisors, and the customer. The name of the responsible party in each of the following steps is bold-lettered and underlined.

3. Procedures:

Technical Evaluation (Steps 1-10)

- Step 1.** The **PM** establishes initial project parameters such as key products, milestones, and customer requirements.
- Step 2.** The **PM** creates a proposed initial schedule and resource plan in PROMIS. The information for the initial schedule and plan can be derived from various sources including: preliminary discussions with technical experts and customers, prior projects, experience, templates, regulations, quality control/assurance requirements, etc.
- Step 3.** The **PM** provides a scope of work, schedule, and resource plan to the appropriate **Section Chief(s)** and requests from them a **Team Member** assignment.
- Initial **District** Decision Point: The **PM** and **Section Chiefs** initially determine resource availability and capability of individuals to perform the required project workload. If they determine that work cannot be accomplished with in-house resources, then they will refer the project to the District Project Review Board (PRB) and potentially, the Regional Management Board (RMB) for further Workload Analysis.
- Step 4.** After initially determining resource availability and capability, the **Section Chief(s)** will review workload and expertise requirements and assign capable **Team Member(s)**. The **Section Chief(s)** will notify the **PM** of the **Team Member** assignments.
- Step 5.** The **PM** coordinates and schedules a team meeting with all assigned **Team Members**. **Section Chief(s)** will attend if they require more information before assigning **Team Members**. The **PM** must provide a funded work item to each Section for these initial labor efforts.

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IMPLEMENTATION MEMORANDUM #03

Subject: Team Establishment and Team Processes

Step 6. Initial Team Meeting: The meeting should include customer representative(s) and incorporate a site visit, if necessary, or when required. The **PM** should use conference calls or other similar interactive methods to include offsite **Team Members**. The following items describe some of the activities of a meeting:

- The **PM** documents and leads the meeting.
- The **Team Members** review the initial scope of work, schedule, and resource plan for technical completeness and sound execution strategy.
- The **Team Members** refine/develop a detailed scope of work, an unconstrained Work Breakdown Structure (WBS), schedule, and resource plan.
- The **Team Members** identify other disciplines which may be needed to execute the project.
- The **Team Members** identify any required follow-on actions.

Note: If the **PM** identifies other **Team Members**, then he/she requests permission from their **Section Chief**(s) to assign them to the new team. The **PM** then should meet with the new **Team Member**(s) to discuss the scope of work, schedule, and budget.

Step 7. Based on the results of the team meetings and other discussions with the **Team Members**, the **PM** then revises the project scope of work, the WBS tasks, the schedule, and the resource plan in PROMIS.

Step 8. All **Team Member(s)** communicate the results of the team meeting, including the preliminary scope of work, schedule, and resource plan, to their **Section Chief**(s) to ensure that the **Section Chief**(s) agree with the technical adequacy of the project plan. **Team Member(s)** use minutes of the team meetings to brief the **Section Chiefs**. **Team Members** will prepare a draft Scope of Services (SOS) to reflect their Section's effort as discussed in the initial team meeting.

Step 9. The **PM** schedules additional team meetings to receive and incorporate **Team Members'** draft SOS's and **Section Chief's** comments via **Team Members**. **Section Chiefs** may attend team meetings to assist in communications or they can arrange their own meetings with **Team Members**. The project team will agree to the project plan (composed of a Scope of Services by discipline, a schedule, and a resource plan unconstrained by resource availability). The **PM** may find it necessary to hold several meetings before the project team can fully define a technically-correct project strategy.

Step 10. The **PM** then documents the team meetings and updates the scope of work, the schedule, and the resource plan in PROMIS. The updated PROMIS data is now the unconstrained Project Management Plan (PMP) for execution of the project.

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IMPLEMENTATION MEMORANDUM #03

Subject: Team Establishment and Team Processes

Resource Evaluation (Steps 11-12)

- Step 11.** The **Team Member(s)** provide the **Section Chief(s)** with the agreed-to Scopes of Services, the schedule, and the resource plan.
- Step 12.** To determine how to provide the requested products and services to the project teams, the **Section Chief(s)** will assign and schedule task assignments to Section employees and then analyze workload extracts from the PROMIS database. The **Section Chief(s)** will then review staff availability and capability and determine excess capacity or workload. **Section Chiefs** will negotiate changes in task scope or schedule with **PMs** to resolve workload conflicts. To resolve excess workload issues, **Section Chiefs** may negotiate a reduction in the scope of work or a delay in the schedule to better fit resource availability and capability. To resolve excess capacity issues, **Section Chiefs** may negotiate for tasks to be rescheduled for earlier start dates or request that Architect/Engineer (AE) contract tasks be converted into in-house labor efforts.

The District PRB, and potentially the RMB, **will perform additional** Workload Analysis to **resolve workload conflicts**.

REPEAT STEPS 9-12 AS REQUIRED until a fully coordinated scope of work, schedule, and resource plan are established.

Acceptance and Execution (Steps 13-15)

- Step 13.** The **Section Chief** accepts the work and requests a Funded Work Item and a final Scope of Services (SOS) from the **PM**.
- Step 14.** The **PM** updates the Funded Work Item(s) links and values through PROMIS and CEFMS and provides a written Scope of Services to the **Section Chiefs**.
- Step 15.** The **PM** conducts team meetings as required (monthly at a minimum) in order to discuss the status of the project and any issues regarding current work. The **PM** should promptly coordinate and document any changes to the agreed scope of work, schedule, or resource plans with **Team Members** and **Section Chiefs**, as described in steps 9-14.

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IMPLEMENTATION MEMORANDUM #03A

Subject: PM/Team Member/Section Chief Roles and Responsibilities

1 February 2000

1. **Purpose/Scope:** The purpose of this memorandum is to clarify the basic roles and responsibilities of the **Project Managers**, the **Technical Team Members** and the **Section Chiefs**. These roles need to be clarified to preclude misconceptions concerning overlap of responsibilities.
2. **Project Manager Roles and Responsibilities:**
 - a. Be primary point of contact with customer.
 - b. Manage overall project execution, including funds, data, commitments, schedule, cost, and quality.
 - c. Develop and manage all work using a Project Management Plan, Scope of Services, PROMIS, NAS, and CEFMS.
 - d. Ensure Quality Control (QC) plans are developed and incorporated into the Project Management Plan.
 - e. Provide project schedule, cost status, and issues to PRB, with corrective action plans for potential slippage or cost over-runs.
 - f. Lead the project team.
 - g. Be responsible/accountable for assigned product(s) through coordination of team efforts.
 - h. Schedule and guide project team meetings.
 - i. Facilitate teamwork and team development.
 - j. Ensure communication and issue resolution.
 - k. Be the team advocate for the team members.
3. **Team Member Roles and Responsibilities:**
 - a. Provide technical expertise.
 - Provide investigations, analyses, reports and other technical products.
 - Perform Quality Assurance (QA) or QC; provide support for independent reviews and other technical assistance.
 - Provide scope and effort input for acquisition/management of out-sourced products for example, Architect-Engineer (AE) services, etc.)
 - Provide technical interface and assistance to execute technical products.

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IMPLEMENTATION MEMORANDUM #03A

Subject: PM/Team Member/Section Chief Roles and Responsibilities

- b. Perform project team member duties full-time or as required.
 - Participate in project team meetings.
 - Facilitate teamwork and team development.
 - Communicate and resolve issues.
 - Be an advocate for the team.
- c. In-house and contractor technical team members hold the same responsibility to produce technical products, perform actual work planning, work details, and QA or QC of technical products.

4. Section Chief Roles and Responsibilities:

- a. Support PMs with resources, data, and commitments.
 - Assign project technical team members.
 - Obtain needed contractor resources.
 - Deliver products on time within budget.
- b. Manage technical resources.
 - Develop professional abilities of workforce.
 - Be a coach; provide oversight of technical work.
 - Assess workload and funding.
 - Balance in-house and contracting needs.
- c. Ensure Quality Assurance and Quality Control of work is resourced.
 - Establish technical criteria and standards.
 - Assure independent technical review.
 - Assure QA and QC processes are adequate.
 - Determine method of technical review.

Regional Project Management Business Process

IMPLEMENTATION MEMORANDUM #03B

Subject: Outreach Acct Mngr/PM/Program Mngr Roles and Responsibilities

1 February 2000

1. **Purpose/Scope:** The purpose of this memorandum is to clearly define the roles and responsibilities of the Installation Project Manager (**IPM**), Outreach Account Manager (**ACM**), Project Manager (**PM**), and Program Manager (**PRGM**) in order to preclude misconceptions concerning overlap of responsibilities. One should understand that job titles described in this memorandum are defined by job duties and not solely by those position titles defined by Human Resources. During the life of a project, one individual can step into one or more of these roles.
2. **Roles and Responsibilities:**
 - a. **Installation Project Manager/Outreach Account Manager:** The **IPM/ACM** is customer-focused and is considered the “One door to the Corps.” Both titles represent the same job duties. The distinction between the two names is that all installations are accounts, but not all accounts are installations. For example, Beale AFB is an installation that is an account, whereas the Department of Energy is an example of an account that is not an installation. Military installations prefer to use the IPM title. The IPM/ACM acts as the primary point of contact for that installation or account, serves as a customer advocate, determines customer needs, and communicates these needs to District staff. Whenever applicable, the IPM/ACM obtains additional work from that customer. The IPM/ACM, in conjunction with the account team, is responsible for developing, maintaining, and implementing the Account Management Plan which is required by Outreach initiatives.
 - b. **Project Manager:** The **PM** maintains a specific project focus and is the customer’s primary contact for that project. The PM manages individual projects that comprise various accounts. PMs act as team leaders and develop, manage, and execute scopes, schedules and budgets. A PM may also act as an IPM/ACM. For projects using another District’s resources, a local PM will still be assigned in the resource District to formulate and lead a team to execute the assigned tasks. However, a PM will also be assigned in the customer’s geographic area.
 - c. **Program Manager:** The **PRGM** maintains a program-level focus when managing funding considerations and policies. The difference between an installation/account and a program is that a program can include many installations or accounts, yet it has a consistent funding type (for example, color of money). For example, the Base Realignment and Closure (BRAC) Program is active at multiple installations. Each program has special funding considerations and policies that must be followed regardless of the type and location of the individual project installation. Therefore, the PRGM ensures that the required program funding considerations and policies are adhered to during a project.

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IMPLEMENTATION MEMORANDUM #03B

Subject: Outreach Acct Mngr/PM/Program Mngr Roles and Responsibilities

Chart 3B-1. Outreach Acct Mngr/PM/Program Mngr Roles and Responsibilities.

Responsibility	IPM/ACM	PM	PRGM
Manages Scope, Schedule and Cost for Individual Projects		X	
Inputs Project Data into PROMIS		X	
Inputs Program Data into PROMIS			X
Coordinates with Senior Level Customer Staff	X		
Coordinates with Technical Counterparts	X	X	
Briefs Customer Monthly	X	X	
Provides Upward Reporting Via PRB	X	X	X
Manages Program/Multi-Projects/Multi-Installations for Customers	X		
Performs oversight of projects within Multiple Programs (HTRW, MILCON, OMA)	X		
Coordinates Customer Surveys	X		
Manages Program Type Activities (Funding & Policy)			X
Performs Formal Outreach Activities (Account Plan and Surveys)	X		
Is Primary POC for Installation/Account	X		
Signs Form 84 (Contract Change Orders)		X	

3. Funding:

- a. **Installation Project Manager/Account Manager:** The time spent performing these duties is charged to all the projects in the account. In rare cases, it may be necessary to charge to the District Outreach Overhead Account. The IPM/ACM must coordinate with the Outreach Director prior to charging to the overhead account.
- b. **Program Manager:** The time spent performing these duties is charged to a combination of direct charges.
- c. **Project Manager:** The time spent performing these duties is charged directly to the project.

Regional Project Management Business Process

IMPLEMENTATION MEMORANDUM #03C

Subject: PM/Construction Manager Roles and Responsibilities

1 February 2000

1. **Purpose/Scope:** The purpose of this memorandum is to define some of the basic responsibilities of the Project Manager (**PM**) and **Construction Branch** during the construction phase of a project. The transition from the design to construction phase is a major milestone in the completion of a project, and marks a significant shift in resource requirements and **Team Member** responsibilities. To successfully execute the construction phase, the PM, customer, and Construction Branch must closely cooperate in order to interface effectively with the new Team Member and the contractor.
2. **Responsibilities:** The **PM** will maintain overall responsibility for the project even while the **Resident Engineer** makes day-to-day decisions affecting the contract and contractor. The **PM** will be responsible for loading required contract-related information into PROMIS and the network analysis system for scheduling. The PM is still the customer's primary point-of-contact (POC) for the project, even though the Resident Engineer may have more frequent contact with the customer during the construction phase. Following contract award, only the **Contracting Officer**, or a designated representative(s), shall direct the contractor to perform work under the contract. The Contracting Officer will give specific legal authorization to the Resident Engineer to enter into binding agreements with the contractor under one of three roles: 1) Administrative Contracting Officer (ACO), 2) Ordering Officer, or 3) Contracting Officer's Representative (COR).
3. **Procedures:** Key control points during construction are identified below:
 - a. **Pre-Award:** The **PM** will advise the Resident Engineer of any Design Review meetings and will forward design reviews to the Field Office for comments. The PM will forward any Engineering Considerations and Instructions for Field Personnel, the Design Analysis, and the Independent Government Estimate (IGE) to the Resident Office. The Customer, PM, and Resident Engineer shall jointly establish an acceptable time growth for the contract.
 - b. **Funds Control:** The **PM** shall be responsible for project funding throughout the construction phase.
 - c. **Interface with the Contractor:** The **Contracting Officer**, or a designated representative (usually the Resident Engineer), is responsible for managing the contract. The **PM** and other **Team Members** (including the Customer) shall work and communicate through the Resident Engineer whenever they require discussions or meetings with the contractor. Likewise, the **Resident Engineer** shall work and communicate through the PM and Contracting Officer when he/she requires discussions with the AE on design issues.
 - d. **PROMIS/NAS:** To accurately record construction progress, the **PM** will coordinate with the Construction Branch to update the PROMIS database every month. The Resident

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IMPLEMENTATION MEMORANDUM #03C

Subject: PM/Construction Manager Roles and Responsibilities

Management System (RMS Windows version) will be designed to populate the PROMIS database with construction-related information. In the interim, the **Resident Engineer** will use Construction Status Reports to provide this information to the PM. The PM will also periodically obtain financial information on contract payments from the CEFMS database.

- e. **Change Orders:** The **Resident Office** will be responsible for handling Construction Change Orders and forwarding copies to the PM and design element. The **Construction Branch** will advise the PM when contingency funds need replenishing. The **PM**, **Resident Engineer**, and **Customer** will review Change Orders that could impact agreed-to completion dates. This review will take place prior to Change Order negotiations and the team's determination and agreement that they will either revise the expected completion date or accelerate the contract. On small user-requested changes (<\$100,000), the Resident Office may, with PM oversight, coordinate directly with the Customer. On larger or complex changes, the PM may have to prepare a design package and coordinate the technical, legal, and funding requirements of the change. The PM will forward the design package, Independent Government Estimate (IGE), and expected duration to the Resident Office so that the Resident Engineer can issue a Request For Proposal (RFP).
- f. **Value Engineering Change Proposals (VECPs):** VECPs received at the Resident Office will be forwarded to the **PM** and Customer. The PM will coordinate the proposal with Team Members and the Resident Engineer.
- g. **Field Visits by the PM:** Before visiting the construction site, the **PM** or other Team Members shall contact the Resident Office. For Outreach purposes, the **PM** should advise the Customer of their visit.
- h. **Monthly Briefings:** The **PM** or **IPM/ACM** is responsible for monthly briefings to the Customer. The Resident Engineer will be available to provide any details regarding ongoing construction issues.
- i. **Review of Request for Information (RFIs) and other Submittals:** The Resident Officer will route typical contractor transmittals that require review to the reviewing office. The **PM** and the Resident Engineer will establish procedures and define the level of the **PM**'s involvement for these reviews.

Regional Project Management Business Process

IMPLEMENTATION MEMORANDUM #03D

Subject: RMB/PRB Roles and Responsibilities

1 February 2000

1. **Purpose/Scope:** The purpose of this memorandum is to outline the roles and responsibilities for the District PRB, Division PRB, and Division RMB in the RPMBP and the methods by which the three groups act as a Regional Business Center. The roles and responsibilities listed below are not meant to be all-inclusive and a group may be assigned further roles and responsibilities to match the given organization's needs and requirements.
2. **District PRB Roles and Responsibilities:** The District PRB includes the District Engineer and representatives from the technical Divisions, Program Management, and Project Management. The group deals with District execution of programs and projects in the fiscal year. More specifically, the District PRB:
 - a. Hears program execution status and projected performance for the fiscal year;
 - b. Reviews the status of projects;
 - c. Makes decisions on project issues based on recommendations from Project Managers;
 - d. Makes decisions on programmatic issues based on recommendations from Program Managers;
 - e. Makes decisions on workload-leveling based on recommendations from Organization Chiefs;
 - f. Recommends issues for the Division PRB, RMB, and District Support Team to examine;
 - g. Enacts decisions made by the Division PRB and RMB.
3. **Division PRB Roles and Responsibilities:** The Division PRB includes representatives from the SPD technical Divisions and Program Management, the Division Engineer and SES's, representatives from each District's Project Management and the District Engineers. The group deals with Division execution of programs and projects in the fiscal year. More specifically, the Division PRB:
 - a. Hears Division and Districts' program execution status and projected performance for the fiscal year;
 - b. Makes decisions on high visibility project issues based on recommendations from DPMs;
 - c. Makes decisions on programmatic issues based on recommendations from Division Program Managers;
 - d. Recommends issues for the RMB and District Support Teams to examine;
 - e. Enacts decisions made by the RMB.

Regional Project Management Business Process

IMPLEMENTATION MEMORANDUM #03D

Subject: RMB/PRB Roles and Responsibilities

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4. **RMB roles and responsibilities:** The RMB includes the DPM and the RM from each District, the Division RM, and SESs. The group guides the Division and its Districts by making strategic decisions affecting execution beyond the current fiscal year. Specifically, the RMB:
 - a. Appoints and manages the RPMBP technical committee;
 - b. Reviews and enacts recommendations from the RPMBP technical committee;
 - c. Makes decisions on recruitment/contracting based on fiscal year workload projections from Division Program Managers;
 - d. Makes decisions on future workload allocation by examining FTE/Contracting usage based on reviewing outyear workload projections.

Regional Project Management Business Process

IMPLEMENTATION MEMORANDUM #04

Subject: Use of PROMIS/NAS – Minimum Requirements

1 February 2000

1. **Purpose/Scope:** The purpose of this memorandum is to establish standard minimum requirements for data that is to be entered into PROMIS. Once entered in PROMIS, the data can be presented in various reports via existing and future tools. These forms include Command Management Reviews (CMR), PPDS, fact sheets, Customer commitments, justification sheets, and other reports. These minimum elements of project level data represent “above the line” reporting requirements.

SOPs #04A through SOP #04F establish the standard procedures for entering and managing program and project data (scope, schedule, and cost) at the task level within PROMIS. These procedures allow the districts to manage to various levels of detail while achieving program and project-specific performance reporting requirements at the Division level. This SOP specifically addresses project level information.

2. **Responsibilities:** The Project Manager (**PM**) is responsible for entering project level information into the corporate databases. The **PM** is also responsible for subsequent maintenance of the project data within PROMIS. The **PM** may assign **Team Members** or budget analysts as proxies to assist in entering and maintaining project data within PROMIS. The PM must keep the following project level information current and accurate:
 - a. Project Information (Customer, Location, Detail, Authority)
 - b. Project Team Members (Corps of Engineers Only)
 - c. Project Comments (General, Synopsis, Issues)
 - d. CEFMS Links
3. **Procedures:** The standard minimum requirements of project level information are:
 - a. **Project Information and Team Members.** The data associated with these items will be entered in accordance with procedures presented in the RPMBP User Manual. The lock-in dates for MILCON forecast award will be entered into PROMIS.
 - b. **Comment Types.** General (project status), Synopsis and Issue type comments will be entered into PROMIS for all projects.
 - The **General** comment will describe the current project status of the project.
 - The **Synopsis** comment is to contain a brief description of the overall project and address project location and proposed project features, as in a fact sheet.
 - The **Issue** comment is to address project issues/customer concerns and include a description of the impact, if any, on the schedule, budget, and milestones/customer commitments. The action taken/required to resolve the issue should also be described under the **Issue** comment. For any project issues/customer concerns, the Issue Description must also include the impact, if any, on the schedule, budget, milestones, and sponsor commitments. **Deviations** from the 2101 schedule of obligations and expenditures will be documented as a separate **Issue** type comment and the term

Regional Project Management Business Process

IMPLEMENTATION MEMORANDUM #04

Subject: Use of PROMIS/NAS – Minimum Requirements

“**Deviation**” will be noted in the comment’s Reference field. Existing and future reports software pulls the two most recent **Issue** comments, the one most recent **Status** and **General** comments, and the latest **Issue** comment with the term “Deviation” in the comment’s Reference field.

- c. **CEFMS Links.** Ensure that the parent work item for the project (as defined by PROMIS) appears in the Project Identification dialog. Ensure that the work item hierarchy appears in CEFMS Initial Data Link dialog.
4. **Version Controls in PROMIS:** Official version designations in PROMIS provide differentiating flags for reporting software, and limit write access to the project to PM or proxy, ensuring data quality. The following official designations shall be used on ALL projects where appropriate.
 - a. **Forecast Version (-F)** – The forecast version shall be used to describe unfunded, unanticipated work needed for workload projections, as well as anticipated work received prior to the Initial Work Allowance. Procedures for entering and managing unanticipated work are described in detail in RPMBP SOP #04E.
 - b. **Baseline Version (-B)** – The baseline version shall be used to document the latest negotiated PMP for existing, ongoing projects.
 - c. **Current Version (-C)** – The current version shall be used to describe the current state of the project, especially as it represents a deviation in scope, schedule, or cost from the negotiated PMP, captured in the baseline version.
5. Step-by-step instructions for entering Project Identification information and comments are included in the RPMBP User Manual.

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IMPLEMENTATION MEMORANDUM #04A

*Subject: Work Breakdown Structure (WBS) Standard
Minimum Templates And Milestones*

1 February 2000

1. **Purpose/Scope:** The purpose of this memorandum is to define standard minimum Work Breakdown Structure (WBS) templates and milestones required for projects in PROMIS. These templates provide the basic minimum structure needed to begin defining a project in PROMIS and satisfy upward reporting requirements. By using the standardized minimum templates, several reporting requirements can be addressed simultaneously, such as for Command Management Reviews (CMR), PPDS, fact sheets, customer commitments, and other data calls. These minimum WBS elements represent “above the line” milestone reporting requirements. These templates can be expanded based on the complexities of specific projects, to ensure that the Project Management Team can control a project’s scope, schedule, and budget to an appropriate level of detail. The RPMBP SOP, RPMBP User Manual and Chapter 9 of the Your Ticket to PROMIS training manual contain instructions on how to expand the WBS.

The order of the templates' tasks have been developed to closely relate (as much as possible) to the sequence of events for actual projects. This was done to provide a clearer picture of the organization of the project and to ease in the development of Resource Estimates in PROMIS. Note: Pre-attached Milestones in the Standard Minimum Templates shall never be removed or re-assigned (neither in the actual project or the template).

2. **Responsibilities:** The Project Manager (**PM**) is responsible for the development of the initial WBS, milestones, and other task specific data as well as subsequent maintenance of the project in PROMIS. **Team Members** are responsible for assisting the **PM** in developing time and cost estimates necessary to perform the work defined by the WBS. **Section Chiefs** shall assist the project’s team members in detailing time and cost estimates for the project. The time and cost estimates will assist the team in the selection of additional tasks (beyond the existing tasks in the Standard Minimum WBS Template) if required. When necessary, The **PM** and **Team Members** will expand the initial, minimum WBS to better capture organizational activities, and/or scheduled delivery dates.
3. **Procedures:** A PROMIS project will include all phases of the project. The **PM** shall start by accessing the appropriate work type Standard Minimum WBS Template in PROMIS or by generating a WBS and attaching the required milestones. The procedures to access the Standard Minimum WBS Templates and attach milestones are included in the RPMBP User Manual. Once team meetings are held and the project’s scope has been defined, the **PM** shall expand the WBS as necessary for that specific project. Work Breakdown Structures will be broken down to the Section level tasks for the purposes of District Wide workload/resource leveling. Additional WBS tasks and milestones (that are currently not required for upward reporting) can be added to the WBS at the discretion of the **PM** and the **Team Members**. The Standard Minimum WBS Templates are attached in Tables 4A-1 through 4A-3 to show the links to the corresponding milestone codes, the milestone names, and the milestone types, and what reporting mechanisms use the milestone. Each existing project shall have all

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IMPLEMENTATION MEMORANDUM #04A

*Subject: Work Breakdown Structure (WBS) Standard
Minimum Templates And Milestones*

applicable CMR milestones, plus all applicable SPD milestones for the current phase (reconnaissance, feasibility, design, or construction) as described below in each project's WBS.

- a. **Civil Works.** The Civil Works Standard Minimum Milestone List is attached in Table 4A-1. Note that the **PM** and **Team Members**, in conjunction with the **customer**, must identify three to five activities per fiscal year that must be flagged as Primary Customer Tasks in PROMIS and may or may not be tied to a mandatory reportable Civil Works Milestone.
- b. **Military Works.** The Military Works Standard Minimum Milestone List is attached as Table 4A-2. In addition to the current upward reporting requirements, HQUSACE is currently working to identify the specific PROMIS fields that will need to be populated to calculate Design Cost Management and In-House Design Percentage. These items will be addressed in a future revision.
- c. **Hazardous, Toxic and Radioactive Waste (HTRW) Program.** The HTRW Standard Minimum Milestone List for Civil and Military projects is attached as Table 4A-3. Note that HQUSACE is currently refining upward reporting requirements for the HTRW program. In the interim, PMs shall follow the guidance contained in the Draft 7 January 1999 letter from MG Milton Hunter, titled "Implementation of the Program and Project Management Information System (PROMIS) for Environmental Programs."
4. Step-by-step instructions for adding and deleting tasks from the WBS and milestones are included in the RPMBP User Manual. (**Reminder:** DO NOT DELETE any tasks from the WBS that include milestones marked with an "M" in the folder to the left of the listed task, as this signifies a required upward reportable milestone linked to that specific task.). The WBS for construction contracts is currently being modified to allow for interfacing with the Resident Management System (RMS).
4. **Mandatory WBS development beyond milestones:** There are situations that will require WBS development beyond the milestones listed here. If any of the following conditions exist, the Project Manager is required to expand the scope of the WBS:
 - Contingency funds.
 - Customer commitments other than milestones.
 - Multiple sections working on the same finish milestone.
 - Work beyond the current phase to the planning horizon (explained in RPMBP SOP #04D).
 - Construction contractor earnings (e.g., Military Work Category Code 60000).

There are other circumstances that the Project Management team may wish to expand the project's scope in PROMIS to exert better scope, schedule, or cost management controls

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IMPLEMENTATION MEMORANDUM #04A

***Subject: Work Breakdown Structure (WBS) Standard
Minimum Templates And Milestones***

(such as specific deliverables within an organization). These additional opportunities to exercise good project management principles are to be encouraged where practical.

Table 4A-1. Civil Minimum Milestones and Milestone Uses.

Civil Milestone Code	Milestone Name	CMR	PPDS	PES	GI DBASE	CAP DBASE	SPD
040	Initiation of Recon Phase				X	X	X
050	District Submits Recon Report	X	X		X	X	X
052	HQ Approves Recon Report		X		X		X
060	District and Sponsor Execute FCSEA		X		X		X
100	Initiate Feasibility Study		X	X	X	X	X
101	Feas Study Pub Wkshp (F2)						X
102	Feas Study Conf #1 (F3)						X
103	Feas Study Conf #2 (F4)						X
104	Submit Draft Feas Study/SPD (F5)						X
130	Feasibility Review Conference				X		X
140	Project Guidance Memorandum				X		X
145	Public Review of Draft Report				X		X
165	Feasibility Report w/NEPA		X		X	X	X
170	MSC Commander's Public Notice	X	X		X		X
290	PED Agrmt Exec DA/Spr, Init PED		X	X			X
310	Filing of Final EIS/EA			X			X
330	Chief's Report to ASA(CW)		X				X
350	President Signs Authorization		X				X
490	TD Submitted by HQUSACE						X
500	P&S Initiated					X	X
590	P&S Approval	X	X			X	X
690	PCA Executed – DA and Sponsor	X	X	X			X
960	Construction Contract Awarded	X	X	X		X	X
970	Contract Physically Complete			X			X
990	Project Physically Complete		X			X	X
999	Project Fiscally Complete						X

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IMPLEMENTATION MEMORANDUM #04A

*Subject: Work Breakdown Structure (WBS) Standard
Minimum Templates And Milestones*

Table 4A-2. Military Minimum Milestones and Milestone Uses.

Military Milestone Code	Milestone Name	CMR	PPDS	SPD
009	Project Management Plan Approval		X	X
025	Design Start		X	X
030	Project Definition	X	X	X
036	Receipt of Final Design Direct		X	X
042	Final Design Complete/RTA	X	X	X
045	Advertise		X	X
048	Construction Contract Bid Open		X	X
051	Construction Contract Award		X	X
066	Beneficial Occupancy Date	X		X
072	Project Fiscally Complete			X

Table 4A-3. HTRW Minimum Milestones and Milestone Uses.

HTRW Milestone Code (Civil)	Milestone Name	CMR	PPDS	SPD
033	Start RI			X
078	Start FS			X
081	Final FS Report Completed			X
135	RA IAG to USACE			X
138	Advertise (IFB) or issue RFP			X
144	Bid Opening or proposals due			X
147	Award RA (Construction Contract)			X
153	RA NTP Issued			X
156	RA physically complete			X
162	RA contract complete			X
165	RA fiscally/financially complete			X
HTRW Milestone Code (Military)	Milestone Name	CMR	PPDS	SPD
186	Start RE disposal			X
189	Complete RE disposal			X

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IMPLEMENTATION MEMORANDUM #04B

Subject: Resource Estimates – Minimum Requirements

1 February 2000

1. **Purpose/Scope:** The purpose of this memorandum is to present an overview of how resource estimates are to be developed in PROMIS. Familiarity with these processes will permit the PM to properly enter resources and schedule all tasks in order to create project budgets and monitor work progress. Accurately developed resource estimates will provide Section Chiefs the added capability to balance workload /resources requirements for all assigned projects within the Districts for the FY, BY, and BY + 1.
2. **Responsibilities:** The Project Manager (**PM**) is responsible for the development of the initial resource estimates and distributions. The PM is also responsible for subsequent maintenance of the project in PROMIS. **Team Members** are responsible for assisting the **PM** in developing time and cost estimates necessary to perform the work defined by the WBS. **Section Chiefs** shall assist the project's Team Members in detailing time and cost estimates for the project. Section Chiefs and project Team Members have the additional responsibility of identifying conflicts with other projects *vis a vis* the workload distributions for the organization. The time and cost estimates generated by the project management team will assist the team in the selection of additional detailed tasks (beyond the existing tasks in the Standard Minimum WBS Templates identified in RPMBP SOP #04A) when necessary.
3. **Procedures:** The **PM** "resources" the project in accordance with resource estimates developed through the team meetings. The "resource" will be the section(s) performing the work defined by a particular task. PROMIS allows the **PM** to enter resources at any task level within the project. All resource estimates entered into PROMIS must equate to the project cost estimate. However, the preferred method for entering resource estimates in PROMIS is:
 - a. Resource estimates should be at activities with NO RESOURCED SUBORDINATE ACTIVITIES. Conversely, resource estimates should have NO RESOURCED PARENT ACTIVITIES.
 - b. Resource estimates should be at activities with NO SCHEDULED SUBORDINATE ACTIVITIES.
 - c. Resource estimates should be at activities with NO SUBORDINATE ACTIVITIES.Resources may be entered only into a task that has been classified in accordance with the Task Classification parameters. The resource estimates are entered into the desired tasks via procedures presented in the RPMBP User Manual. The **PM** will place contingency estimates as a single WBS project management task. Contingency funds for contract modifications will be identified as a separate task under the construction WBS. At a minimum, the PM will update the project resource estimates on a monthly basis and adjust/add/delete resource estimates as necessary to reflect schedule changes and/or modifications to the project scope of work.
4. Step-by-step instructions for adding, modifying and deleting resource estimates from WBS activities are included in the RPMBP User Manual.

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IMPLEMENTATION MEMORANDUM #04C

Subject: NAS Scheduling – Minimum Requirements

1 February 2000

1. **Purpose/Scope:** The purpose of this memorandum is to present an overview of how PROMIS and the District select the Network Analysis System (NAS) interface to exchange data and create schedules. Familiarity with these processes will permit the **PM** to properly schedule all tasks in order to monitor work progress.
2. **Responsibilities:** The **PM** with input from the **Team** is responsible for the development of the initial schedule and subsequent maintenance of the schedule within the NAS. Development and maintenance of the schedule not only requires development of task duration, but also the identification of task dependencies. **Section Chiefs** shall assist the project's Team Members in identifying these predecessor-successor relationships as it affects the organization's function in the project. Section Chiefs and project Team Members have the additional responsibility of identifying conflicts with other projects *vis a vis* the schedule and workload distributions for the organization.
3. **Procedures:** PROMIS requires the use of a NAS in order to schedule project activities. PROMIS defines a project activity as a PROMIS WBS task which has schedule data associated with it. PROMIS allows the **PM** to select the tasks to be transferred to the NAS as activities and scheduled. The **PM** does this by selecting the NAS Activity check box on the Task Identification dialog as described in the RPMBP User Manual. A WBS task which contains a resource estimate(s) (unless PROMIS default setting is modified) will also be considered by PROMIS to be a NAS Activity regardless of whether or not it has been so designated in the Task Identification dialog. If a WBS task is not identified as an NAS activity it will not be transferred to the NAS for scheduling. The Standard Minimum WBS Templates (SOP #04A) have all tasks selected as NAS Activities. If the **PM** adds or modifies any Standard Minimum WBS Template tasks and desires to have these tasks scheduled in the NAS, they must be selected as NAS activities by the preceding procedures. The **PM** must also schedule all activities (WBS tasks) that will have work items associated with them. After the **PM** has developed the WBS tasks and milestones for the project, the scheduling process commences. The following steps comprise this process.
 - Step 1:** Connecting from PROMIS to the NAS: The NAS application is activated and the WBS tasks selected as NAS activities in PROMIS are transferred and now appear in NAS in the order as selected as activities. The **PM** designates the overall project start date.
 - Step 2:** Sorting (reordering) activities in the NAS: The **PM** reorders the activities to obtain a logical sequence of events for the project. The **PM** also establishes the parent/child relationships between the NAS activities.
 - Step 3:** Develop activity dependencies in the NAS: The **PM** constructs both the predecessor relationships and the type of relationships (i.e., finish-to-start, start-to-start, etc.) between the NAS activities.

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IMPLEMENTATION MEMORANDUM #04C

Subject: NAS Scheduling – Minimum Requirements

Step 4: Establish activity duration in the NAS: The **PM** creates the duration for each child activity in the NAS. (Most NAS will roll-up the cumulative duration of the child activities into its parent.)

Step 5: Returning to PROMIS from the NAS.

Section Chiefs have the sole responsibility to identify capability and workload issues as a project's scope/schedule/cost impacts all other projects to which the organization has been assigned. There are automated workload reports that organization heads can use to identify conflicts and subsequently resolve the conflicts by adjusting resource distributions. These scheduling conflicts and resolutions must be communicated to the project management team for consideration for entry into PROMIS. A change in the schedule/resource distribution must be analyzed to see impacts to the project's scope/schedule/cost.

- a. **Resource Distributions** in PROMIS default to a linear distribution based upon the activity's Early Start and Early Finish dates, developed by the NAS. The project management team can adjust these dates and the resource distributions should the organization heads have a workload balancing issue.
 - b. **Scheduling Milestones:** All tasks that contain a milestone(s) must be identified as a NAS activity in PROMIS and scheduled in the NAS. All available reporting tools track the milestone's Early Start and Early Finish dates, and require particular attention by the project management team.
 - c. **Scheduling Customer Commitments:** All customer commitments generated after coordination between the project management team and the customer must be identified and scheduled in PROMIS. The PM will designate a Primary Customer Task as an NAS activity.
 - d. **Scheduling Resourced WBS Tasks:** All WBS tasks that have resource estimates attached must be scheduled, regardless of whether they do or do not contain milestones. Unless the default PROMIS settings are changed, PROMIS will send to the NAS all tasks that contain resource estimates, even if they have not been designated as a NAS activity
4. Step-by-step instructions for the preceding procedures have been created and appear in the RPMBP User Manual.

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IMPLEMENTATION MEMORANDUM #04D

Subject: Outyear/Unfunded/Unknown Program Minimum Requirements

1 February 2000

1. **Purpose/Scope:** The purpose of this memorandum is to provide guidelines for scheduling and resourcing the execution of outyear work in PROMIS. "Outyear" is defined as time beyond the current fiscal year to BY+1 or end of current phase, whichever is longer. Scheduling and resourcing for outyears will be for purposes of projecting staffing needs and project execution methods. The guidelines presented herein apply to "hard" existing work (current projects and other commitments), "soft" (future phases) existing work, and unknown new program level work). These guidelines will also address projected, unassigned Program level work.

2. **Definitions:**

Hard Work: Tasks within an active project with an approved schedule and adequate funding available or planned and expected funding.

Soft Work: Tasks scheduled and expected to likely occur within a known project, but the effort is dependent on receipt of additional information, external events such as receipt of a directive, authorization, customer approval, and signing of an agreement.

Unknown Program Level Work: Work not specifically identifiable as specific projects, but foreseen program level work that is expected to occur between FY and BY+1.

2. **Responsibilities:**

- a. The **Project Manager (PM)** is responsible for the development of the existing and anticipated project's scope, schedule, and cost as far into the future as necessary. The **PM** is also responsible for subsequent maintenance of the project in PROMIS. The **PM** is responsible for identifying future efforts to the outyears on existing projects, as well as unknown program level work.
- b. The **PRGM** will manage unknown work forward in time to the outyears.
- c. **Team Members** are responsible for assisting the **PM** in developing the schedule necessary to perform the work defined by the WBS to the outyears. **Team Members** are also responsible for identifying task dependencies that have to be captured in the NAS across functions.
- d. **Section Chiefs** shall assist the project and program managers in identifying "soft" work conflicts with other projects *vis a vis* the schedule and workload distributions for the organization to the outyears. As the Section Chiefs review their workload, "hard" tasks will be assigned higher priority for in-house staff assignment. "Soft" or "Unknown" tasks will be given secondary priority and will ideally be assigned to contract resources to minimize potential impacts to staff if projected schedules are not maintained.

Regional Project Management Business Process

IMPLEMENTATION MEMORANDUM #04D

Subject: Outyear/Unfunded/Unknown Program Minimum Requirements

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- 4. Procedures:** It is recognized that estimates for an organization's BY and BY+1 taskings will be based on less than optimum information. Nevertheless, even a rough estimate based on PSP, PMP or other written documents will be worthwhile in anticipating workload in the outyears and therefore useful in the analysis. The Civil Works Program shall be executed as described herein. The Military Works and HTRW Programs shall also adhere to the following guidelines with the additional clarifications shown below. All projects for all programs should be *scheduled* through the completion of the project and updated as better information is available. The WBS Standard Minimum Templates shall be used as a guideline, deleting non-applicable tasks and augmented as required when resourcing to the Section level for the outyears. By 1 March, all BY work shall be resourced to the Section level for the purpose of determining the District's overall workload and each individual Section's workload. BY+1 shall be resourced to the Section level by 1 June.

For the Military Works and the HTRW Programs, *schedule* and *resource* all tasks to the Section level to the project percent completion authorized. For the portion of the design or study, or for the construction of a project, not authorized to proceed, *schedule* the project sufficiently to include all milestones/goals (design start/finish, Ready To Advertise (RTA), award, Beneficial Occupancy Date (BOD), etc.) and *resource* the major tasks to the Section level for the current and through BY+1 or end of phase which ever is greater. Include estimates of both hired labor and contract costs.

- 5. Unknown Program Level Work:** The planning horizon for unknown programs is BY+1. Each program will have ONE program entry in PROMIS (e.g., Mil OM, Sect. 205, Sect. 14, Sect. 1135, New GI Starts, New SFO/WFO, Unanticipated HTRW). All programs must have a minimum scope equal to the section level for each SECTION level organization doing work on the project or program for EACH fiscal year, resource estimates to EACH section for EACH fiscal year, and scheduled for EACH fiscal year. Once scheduled, the resource distributions can be adjusted at the discretion of the Program Manager and Section Chiefs. By 1 March, all BY work shall be resourced to the Section level for the purpose of determining the District's overall workload and each individual Section's workload. BY+1 shall be resourced to the Section level by 1 June.
- 6. Version controls of Unknown Program Level Work:** Unknown programs shall be officially designated as "F" for Forecast. This official designation will enable **Section Chiefs** to differentiate unknown work when adjusting workload for FY, BY and BY+1. These version designations will also support functions in FORCON, PRISM, and the successor to PROMIS.

Regional Project Management Business Process

IMPLEMENTATION MEMORANDUM #04D

Subject: Outyear/Unfunded/Unknown Program Minimum Requirements

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7. **Movement from Forecast work to Actual Projects:** During the course of the FY, unknown work is converted to “hard” or “soft” work (e.g., Congressional add, new WFO/SFO customer, identification of PM for new starts). This activity must be accounted for in PROMIS through the revision of one project and the creation of another. The **Program Manager** must amend downward the resource estimates/distributions for the sections doing the new work during the time period covered by the new work in the forecasted version of the program. The new project’s **Project Manager** must create the new project, with the support of **Team Members** and **Section Chiefs**, pursuant to RPMBP SOP #04.

Regional Project Management Business Process

IMPLEMENTATION MEMORANDUM #04E

Subject: Project Management Plan (PMP) Minimum Requirements

1 February 2000

1. **Purpose/Scope:** The purpose of this memorandum is to define the minimum requirements for PMPs for Civil Works, Military, HTRW, and SFO projects. The PMP serves as a management and quality control tool because it considers all aspects and resources of a project. It includes planning, design, and execution. The process for Civil Works is slightly different than for Military and HTRW projects, as a Project Study Plan (PSP) is developed during the reconnaissance phase of a study prior to a PMP. However, the PSP is the initial component of the PMP and as such, much of what is discussed below in terms of minimum requirements also applies in the development of the PSP.
2. **Responsibilities:** Negotiation of the PMP among the technical elements will involve, not only members of the study team, but also those Section Chiefs who must commit to the costs, schedules, and scope of the work products. The **Project Manager** is responsible for leading the study team and for coordinating with them and any other organizations involved in project execution. The PMP is a living document and in accordance with ER 5-1-11, it is updated by the **Project Manager** as additional requirements and information become available. The **Project Manager** is responsible for ensuring that the PMP is updated. The team members are responsible for ensuring that the Project Manager knows when significant changes occur which will require an updated plan.
3. **Procedures:** The **Project Manager** will ensure that at a minimum, the PMP contains the following information:
 - a. Overall Project Information (description, authority, team members, location, customer requirements, and communication strategy).
 - b. PROMIS Tasks and Estimates (WBS, resource estimates and distributions, milestones, and customer commitments).
 - c. PROMIS Schedule (from NAS).
 - d. Organizational Scopes (SOSs by organization).
 - e. Quality Control Plan.

The PROMIS database contains much of the information that will be used to finalize the PMP.

Regional Project Management Business Process

IMPLEMENTATION MEMORANDUM #04F

Subject: PROMIS for Unique Programs

1 February 2000

1. **Purpose/Scope:** All programs, all projects, all work being completed or planned for execution in a District shall be input in PROMIS. PROMIS was not specifically designed for all programs but they still can be entered in PROMIS to assure that total workload can be assessed both at a District and Regional level. The purpose of this memorandum is to define the strategies for managing the smaller programs/projects with unique characteristics and capturing the work in the PROMIS database. Example programs are (not all inclusive):
 - Readiness Branch Programs
 - Miscellaneous General Investigations Programs
 - Operations & Maintenance, Army (OMA)
 - Operations & Maintenance, Air Force (OMAF)
 - Support for Others (SFO)
 - Real Estate Leasing Program
 - Real Estate Homeowners Assistance Program (HAP)
2. **Responsibilities:** In most cases there are no variations in the Project Manager's responsibilities as defined in the RPMBP. Specific details for entering the program data in PROMIS will be the responsibility of the Program Manager. A Project Manager will be assigned for each program/project and will be responsible for organizing a team (as necessary), development of a plan (scope, cost and schedule), loading information into the PROMIS database, generating and distributing the Scope of Service (SOS), distribution of funds, and tracking execution.
3. **Procedures:** Large projects follow the standard RPMBP processes and load into PROMIS as separate projects. Multiple smaller projects such as Installation OMA (both in dollar value and minimal in-house resource requirements), can be lumped together under one project title which would be the name of the installation, program, or major sub-category. Each actual project would be entered as a task line. For small projects, the WBS will be the minimum breakdown necessary. Resourcing assignments will be no different in process, but will be very limited by requirement. Creating a CEFMS WI/resource plan using PROMIS will only be different in that the interface will be done at each task line within the PROMIS WBS.

Regional Project Management Business Process

IMPLEMENTATION MEMORANDUM #05

Subject: PROMIS/CEFMS Interface

1 February 2000

1. **Purpose/Scope:** The purpose of this memorandum is to provide an overview of how PROMIS and CEFMS interface to create work items and to track costs. Familiarity with this process will allow the PM to more effectively organize funding by task and organization. The specific steps required to link PROMIS and CEFMS are explained in the RPMBP User Manual.
2. **Responsibilities:** The PM is ultimately responsible for the distribution of funds and tracking of costs throughout the life of a project. Successful management of funds requires up-front planning and coordination by the PM with Team Members and Section Chiefs prior to the start of work to make sure that all anticipated costs have been addressed. Proper planning will keep changes and additions to resource requirements in PROMIS and CEFMS during the course of the project to a minimum. The PM will be assisted by budget analysts in both PPMD and other technical elements as necessary. Sections will be responsible for creating PR&Cs from the work items provided and to insure that funds are expended as detailed in the Scope of Services.
3. **Procedures:** Since the conversion from COEMIS to CEFMS, PM's and organizations have been using a variety of methods to track and fund work efforts. Work items from CEFMS can be linked in PROMIS for tracking at either the organizational level, task level or a combination of levels. However, the preferred method for linking work items to PROMIS is as follows:
 - a. To accurately track the Actual Cost of Work Performed, each WBS task in PROMIS that has a resource estimate must be linked to at least one CEFMS work item (Ordering or Funding). Where an organization has several tasks identified in the project's WBS, each task's Actual Cost of Work Performed must be captured through a subordinate work item (ordering or funding) that references the section's funded work item in all CEFMS PR&Cs.
 - b. There are two ways to create work items in CEFMS, manually or by creating the Resource Plan in PROMIS. Technical considerations, internal RM controls, amount of effort, or other factors will guide the project management team in selecting the appropriate method. Regardless of method, the PM will link the PROMIS WBS with the CEFMS work items to capture Actual Cost of Work Performed.
 - c. PROMIS supports linking several CEFMS work items to one WBS activity, but this feature is generally NOT a good idea. Additional WBS activities should be used to tie two work items to a WBS activity. An exception to this rule is cost-shared studies with Federal and non-Federal dollars. Another exception to this rule is activities paid by several customers simultaneously.

Regional Project Management Business Process

IMPLEMENTATION MEMORANDUM #06

Subject: Regional Extract Database

1 February 2000

1. **Purpose/Scope:** The purpose of this memorandum is to define the roles, responsibilities and procedures for the RPMBP database. The RPMBP Database delivers the RPMBP process tools as an extract of the data in several Corps standard systems, namely PROMIS, CEFMS, and RMS. It stores additional data generated by the users when using the RPMBP tools. The database stores the RPMBP tools functions and procedures.

2. **Definitions:**

- a. The **Web Browser** is the web browser installed as the standard desktop web browser on the user's desktop. No custom installation of browsers is anticipated. There are two major Web Browsers installed in the RPMBP environment; Netscape and Internet Explorer. Some adaptation to the browser type will probably have to be incorporated at the web server to sense the browser type to accommodate the differences between them. This may require alternate browser scripts to be written.
- b. The **Web Server** will contain the browser scripts and HTML files that will be requested by the users in the execution of the RPMBP tools and reports. The Web Server will reside on the SPD Intranet. The users will initially gain access to the RPMBP Web Page, and navigate through a menu system to the desired RPMBP tool or report. This web server is planned to reside in the Sacramento District and will be operated and maintained by the Sacramento District IMO.
- c. The **Extract Database** will be an Oracle database. This database will store the extract data required for the RPMBP tools and report, the procedures and functions of the RPMBP Web Server, and the procedures and functions to extract and refresh the extract data from the Corps standard systems. This database is planned to reside in the Sacramento District and will be operated and maintained by the Sacramento District IMO.

3. **Responsibilities:**

- a. **Proponent:** The proponent for the system is the SPD Regional Management Board. The RMB will ensure that the system is providing the service required for managing the Regional Business Processes, provide guidance in the modification of the system required because of changes to the business processes, and termination of the system. The RMB will be responsible for the maintenance or modification of the Business Processes on which the RPMBP system is based.
- b. **Developer:** The developer of the System is the RPMBP Process Action Team, augmented by the Sacramento District IMO and Contract Support. The developer will produce a working version of the database and web reports for RMB approval in accordance with the RMB Tasking Memorandum.

Regional Project Management Business Process

IMPLEMENTATION MEMORANDUM #06

Subject: Regional Extract Database

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- c. **System Administration:** System Administration and Operations and Maintenance will be performed by the Sacramento District IMO. Any required system changes will be forwarded to the RPMBP Technical Committee for approval and inclusion into the RPMBP Documents.
 - d. **RPMBP Technical Committee:** The RMB will select and keep in effect a Technical Committee that will review and update the Business Processes, make recommendations to the RMB for the creation or deletion of Business Processes, and review, approve and prioritize requests for changes or modifications to the RPMBP. The RPMBP tool will provide a means of forwarding requests for system changes or modifications to the committee. The committee will be responsible for preparing specifications for system change. System Changes will be forwarded to the System Administrator for inclusion into the system. The Technical Committee should plan to meet a minimum of once quarterly. The Committee Chair will be a member of the RMB and will be the conduit to the RMB for the findings and recommendations for system change. The Committee Chair will report records of approvals and disapprovals and all requirements and taskings of the RMB to the technical committee.
4. **Procedure:** The RPMBP database and tools are delivered to the users' desktops through their **Web Browser**. The Reports and Menus are stored in a **Web Server**, which itself stores the procedures and functions to extract and format data stored in an **Extract Database**. The extract database contains stored procedures and function to extract and refresh required data from the Corps standard systems. This is called a three-tier architecture.

Regional Project Management Business Process

IMPLEMENTATION MEMORANDUM #06A

Subject: Funds Distribution

1 February 2000

1. **Purpose/Scope:** The purpose of this memorandum is to present an overview on the distribution of project funds and the use of PROMIS and the Funds Distribution tool available in the Regional database.
2. **Responsibilities:** The **Project Managers** are responsible for performing the initial distribution of funds as well as any modifications to the distributions. **Section Chiefs** and **Team Members** are responsible for providing required funding distribution data (by task) developed through workload analysis to the **PM**.
3. **Procedures:** Funds distribution is the process that distributes the estimated budget across applicable fiscal years for each resourced and scheduled task of a project that has data entered in PROMIS. The tools for funds distribution are provided either directly through PROMIS functions or through functions located on the Regional database.
 - a. The Funds distribution process will occur for all projects entered in PROMIS. Normally, this process will be performed upon completion of initial coordination/team meeting and the initial project data entry (for example, resource estimates and schedule complete) into PROMIS. This process will also re-occur after a project has been "progressed", whereby schedule data and/or resource estimates have been altered.
 - b. Funds distribution data for reports and management analysis will be extracted from the PROMIS database. Therefore, funds distribution developed using the Funds Distribution functions of the Regional database will have to be reentered in PROMIS at least on a quarterly basis. Entry of funding distribution through PROMIS is outlined in the RPMBP User Manual.
 - c. Funds distribution data can be provided through the Regional database (PROMIS Reports icon). This dialog contains a listing of all scheduled and resourced tasks by project. Highlighting a task will present a field populated with the organizations assigned as resources to the task. The **PM** will distribute funds (by organization) during the period which the organizations will perform work on the task dependent upon the schedule start/finish dates for the task. The cumulative value of all distributed funds must be in "balance" with the budget for an organization before the software will allow the process to proceed. The process will occur for all remaining organizations assigned to the task and then for all remaining tasks in the project which have been resourced.
 - d. Other functions available in the Funds Distribution dialog are the designating of a task as "hard" or "soft", entry of current fiscal year funding and entry of the current year budget amount issued to an organization by task. All tasks are defaulted as "hard" tasks. Undesignating a task as "hard" in this view will create a "soft" status for the task.
 - e. The four options available for current FY funding are: Available Federal, Planned Federal, Available Non-Federal, and Planned Non-Federal. The entry of the current year budget issued to an organization (by task) in this view will be the amount designated in the Scope of Services (SOS).

Regional Project Management Business Process

IMPLEMENTATION MEMORANDUM #06B

Subject: Scope of Services for Workload Assignments

1 February 2000

1. **Purpose/Scope:** The purpose of this memorandum is to detail the steps and tools that are available to clearly communicate task agreements made by the **PM** and the **Team Members** during discussions/ negotiations at project team meetings. These meetings should have clearly established agreements on scope, schedule and budgets.
 - a. **Reference:**

RPMBP Implementation Memorandum SOP #03 dated 1 February 2000, Project Team Establishment and Team Process.
 - b. **Tools:**
 - **PROMIS:** The **PM** will utilize this program to create WBS, resource estimates and distributions, schedule, and link Work Items.
 - **CEFMS:** The **PM** will utilize this program to attach funds to the Funded Work Item for each organization.
 - **Regional Database:** The **PM** will utilize this database to create the actual SOS with specific fields populated from PROMIS.
 - **Outlook:** The **PM** will utilize this software to transmit the SOS to the technical organization Section Chief.
2. **Responsibilities:**
 - a. The **PM** is responsible for generating the Scope of Services (SOS) document and providing it to each of the **Team Members** and their respective **Section Chiefs**.
 - b. The **Section Chiefs** are responsible for acceptance and confirmation of the SOS to the **PM**.
3. **Procedures:** Activation of the SOS tools on the RPMBP system will generate two listings:
 - a. A listing of all projects from which the **PM** will select his project.
 - b. A listing of all District organizations from which the **PM** will select the Branch/Section for which the SOS is to be developed. These two selections will download information from PROMIS to the Regional database and populate the appropriate fields in the SOS (Figure 1). Manual entry of data into the SOS will also be required as described below.
 - c. The information that will be automatically populated to the SOS will be the following:
 - Project title (the project name, for example, Guadalupe or Beale Barracks).
 - Date (the actual date the SOS is created).
 - Organization (the actual group by Organizational Code performing the work).

Regional Project Management Business Process

IMPLEMENTATION MEMORANDUM #06B

Subject: Scope of Services for Workload Assignments

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- Tasking Description(s) (the PROMIS WBS task description).
 - Overall schedule start/finish dates (the PROMIS schedule for the above task which may cross FY's).
 - Total task budget over all FY's (the total dollars entered in PROMIS for all the FY's involved).
 - Current FY budget (reflects only the amount in PROMIS which is the planned amount available to that organization).
 - Funded Work Item number (the FWI tasking is identified in PROMIS with the funds assigned in CEFMS and the actual FWI, then sent back to PROMIS).
 - Brief project description (From PROMIS Synopsis Comment field providing location and the type of project, etc.).
- d. The information to be manually added will be the following:
- Revision number, as required (for tracking all revisions).
 - The assigned Team Member (POC) from the organization (identifying the Team Member will enhance communication and responsibility assignments for the Team).
 - Description of the specific tasks as agreed to in the team meetings.
 - Identification of any intermediate milestones for subtasks in text format.
 - Identification of those specific individuals who participated in the coordinated agreement.

The above procedure will be repeated for each **Section** that has been assigned as a resource for the project.

Regional Project Management Business Process

IMPLEMENTATION MEMORANDUM #06B

Subject: Scope of Services for Workload Assignments

1 February 2000

SOS Number: 00-02-00

Revision: 0

Project Manager: BROWN, JOHN E

Project: WEST SACRAMENTO, CA-CON

PM Phone Number: 916-557-7801

Task: Environmental Studies Documents

Funded Work Item: 001X4W

Organization: ENVIRONMENTAL PLANNING SEC

Work Category Code: 06000

Last 09/30/1999

Work Cat Elem Code: WD000

		<i>Fiscal Year</i>					
<i>Tasks</i>	<i>Res Type</i>	<i>Total Budget</i>	<i>Start</i>	<i>Finish</i>	<i>CFY</i>	<i>Issued</i>	<i>CFY + 1</i>
Environmental Studies Documents	WKBOTHFE	31,250	01-Oct-1997	30-Nov-2000	0	0	0
Environmental Studies Documents	LABOR	66,110	01-Oct-1997	30-Nov-2000	25,000	5,000	0
Environmental Studies Documents	AESVCS	226,426	01-Oct-1997	30-Nov-2000	138,213	81,213	88,213
Totals:		323,786	01-Oct-1997	30-Nov-2000	163,213	86,213	88,213

Scope:

Prepare SOW for, coordinate activities of, and provide monitoring report for contract biologist for GGS; prepare SOW for, coordinate activities of, and provide monitoring report for contractor for Swainson's hawk survey; provide construction contractor awareness training for GGS and environmental coordination with various elements of District, Rec Board, and USFWS; site visits; and attend team meetings.

The Scope of Services has been coordinated with John Brown based on the above schedule and funding. Any changes to the schedule and/or funding must be coordinated with the Project Manager.

Figure 6B-1. Example: Scope of Services Report

Regional Project Management Business Process

IMPLEMENTATION MEMORANDUM #07

Subject: Project Management Using Earned Value Analysis

1 February 2000

1. **Purpose/Scope:** The purpose of this memorandum is to define Earned Value Project Management (EVPM) using PROMIS. EVPM tracks performance (instead of spending) and has predictive statistics which will inform the project management team whether work can be accomplished within the schedule and cost constraints defined by the PMP, or how remaining work must be managed to meet current schedule and budget constraints. By using the standardized minimum requirements described in RPMBP SOPs #04, several reporting requirements have been addressed simultaneously, such as Command Management Reviews, PPDS, fact sheets, Customer commitments, workload balancing and other data calls. Earned Value Project Measurement occurs within these standardized structures. This memorandum will inform PROMIS users how EVPM data can be extracted from PROMIS, what the figures mean, and what to do with them.
2. **Responsibilities:** The Project Manager (**PM**) is responsible for the development and maintenance of the project's scope, schedule, and cost using RPMBP SOP #04. **Team Members** are responsible for assisting the **PM** in developing the project's scope, schedule, and cost necessary to perform the work defined by the PMP. **Team Members** are also responsible for developing an objective metric that will measure and document performance (expressed as Physical Percent Complete in the NAS) based upon the PROMIS project. Lastly, **Team Members** and the **PM** will identify "below-the-line" activities where SOPs #04 do not provide enough scope, schedule, and cost controls.
3. **Procedures:** The procedures to define the Standard Minimum WBS Templates are included in the RPMBP SOPs #04A, the resource estimates in SOP #04B, and the minimum schedule in SOP #04C. These SOPs were designed with the goal of unifying scope, schedule, and cost management. That integration is required to do EVPM. The PROMIS project developed using RPMBP SOPs #04 is sufficient to do EVPM, provided that meaningful metrics for measuring performance (expressed as Physical Percent Complete in the NAS) are available.

Should the PROMIS project not have sufficient detail to provide meaningful EVPM, additional "below-the-line" tasks can be created within the WBS provided that each "below-the-line" activity must represent a union of schedule, cost, and scope management. In PROMIS, each activity must have a WBS activity, a resource estimate/distribution, a schedule from the NAS, and a Work Item (Ordering or Funding) from CEFMS (as explained in RPMBP SOPs #04).
4. **Determining Objective Performance Metrics:** Most PMPs have section-based, task-specific activities that must be executed in support of the project's goals. For purposes of documenting Earned Value, the PMP (Baseline Version) will serve as an invaluable tool. Activities that can be started and completed within one reporting cycle (such as the monthly PRB) can be flagged as complete within the NAS. The difficulty with the objective performance metric occurs where the activity crosses one or more reporting cycles. To that end, a method of measuring Earned Value must be developed at the project's outset. There

Regional Project Management Business Process

IMPLEMENTATION MEMORANDUM #07

Subject: Project Management Using Earned Value Analysis

are several methods of documenting Earned Value and the project management team is encouraged to use professional judgement in selecting the appropriate method for each task. Use as many of these methods as necessary to describe project performance in PROMIS.

- **Weighted milestone** – The activity is broken into milestones (not reported in PROMIS) with each milestone given a budget value, which is earned only when the milestone is completed. This is the most preferred, but most difficult method to measure Earned Value.
- **Fixed formula** – The activity is broken into two percentages (0/100; 25/75; 50/50; 80/20, etc.). The start of the activity is automatically given the first percentage of Earned Value. The second percentage is not given until the activity is COMPLETE.
- **Percent complete estimates** – The Team Member responsible for that activity uses professional judgement to estimate the completed effort's Earned Value. There is a potential hazard in this, as some activities may simply compute Earned Value to the Actual Cost of Work Performed. There has to be an objective check on an individual's optimistic estimates of Earned Value.
- **Percent complete and milestone gates** – The activity is broken into two or more milestones (not reported in PROMIS, each given a reasonable percentage of the total activity's resource estimate). Earned Value is documented only when the milestone is reached.
- **Earned units** – Used where the activity is repetitious. Earned Value is computed as each unit's percentage value of the total activity's package.
- **Earned standards** – Used where the activity is repetitious and there is a documented history of performance. Earned Value is computed as each unit's percentage value of the total activity's package, based upon past performance standards.
- **Apportioned relationships to discrete work** – This is an excellent metric for measuring ongoing activities over the life of the project (for example, project management). The Earned Value for this activity is proportional to the Earned Value for all the other activities pertaining to it. In the case of project management, the project manager's Earned Value (percentage of resource estimate) is equal to the Earned Value for the project (percentage of total resource estimate).
- **Level of Effort** – This method is NOT RECOMMENDED, but can be used to track activities that are more TIME-related than PRODUCT-related. Earned Value equals Budgeted Cost of Work Scheduled. This metric cannot capture schedule variances, only cost variances.

It is important to decide which performance measurement metric, balancing benefits and costs, to the task during the development of the PMP, keeping in mind that the metric must be applied to the activity from start to completion.

Regional Project Management Business Process

IMPLEMENTATION MEMORANDUM #07

Subject: Project Management Using Earned Value Analysis

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5. **Explanation of Earned Value Metrics** – Earned Value computations work off five values computed for any project. They are explained for clarification below:
- **Budgeted Cost of Work Scheduled (BCWS or Planned Value)** – The sum total of all resource distributions related to a task between the activity start date and the present date.
 - **Budgeted Cost of Work Performed (BCWP or Earned Value)** – The amount of work performed as it relates to some portion of the activity's Resource Estimate. Captured in PROMIS as Physical Percent Complete in the NAS.
 - **Actual Cost of Work Performed (ACWP or Actual Value)** – The sum total of costs accrued for a particular activity. Captured in PROMIS as Actual Cost against a CEFMS Work Item (Ordering or Funding).
 - **Budget At Complete (BAC)** – The agreed-upon cost of project activities, as represented by the PMP and the Baseline official version in PROMIS.
 - **Latest Revised Estimate (LRE)** – The project manager's current estimate of what the finished project's final cost will be, represented by the Current official version in PROMIS.

These five values drive all Earned Value Project Management calculations.

6. **Retrieving Earned Value information from PROMIS:** Automated tools are provided in the Regional database for the project management team to retrieve and analyze Earned Value Project Measurement information. Specifically, the minimum Earned Value data takes the form of seven statistics, which are populated in many other reports, but are explained below:
- **Cost Variance (CV)** - Difference in Actual Cost of Work Performed (ACWP – The sum total all funds expenditures to date for each task.) and the Budgeted Cost of Work Performed (BCWP – Resource Estimate times Physical Percent Complete), expressed in dollars.
 - **Schedule Variance (SV)** – Difference in Budgeted Cost of Work Scheduled (BCWS – The sum total of resource distributions between start of project and current date for each task.) and the Budgeted Cost of Work Performed (BCWP – Resource Estimate times Physical Percent Complete), expressed in dollars.
 - **Cost Performance Index (CPI)** – Describes the cost efficiency of work on the project as represented by the relationship between BCWP and ACWP.
 - **Schedule Performance Index (SPI)** – Describes the planned schedule efficiency of work on the project as represented by the relationship between BCWP and BCWS.
 - **Budget At Complete (BAC)** – The agreed-upon cost of project activities, as represented by the PMP and the Baseline official version in PROMIS.

Regional Project Management Business Process

IMPLEMENTATION MEMORANDUM #07

Subject: Project Management Using Earned Value Analysis

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- **Latest Revised Estimate (LRE)** – The project manager’s current estimate of what the finished project’s final cost will be, represented by the Current official version in PROMIS.
 - **Estimate At Complete (EAC)** – A computed value that represents the projected final costs for an activity. The EAC represents ACWP plus an estimate of costs needed to complete the activity. There are currently several methods (ranging from degrees of optimism) to compute the estimate of remaining costs.

Detailed, project-specific Earned Value Project Measurement tools are available to interested Project Management teams to identify sources of cost and schedule variances and to analyze their impacts on final delivery costs and time frame. In particular, SPA has developed a tool to extract PROMIS data to a commercial Earned Value analysis and reporting package.

7. Step-by-step instructions for creating “below-the-line” activities are identical to the procedures outlined in RPMBP SOP #04, and are detailed in the RPMBP User Manual.

Regional Project Management Business Process

IMPLEMENTATION MEMORANDUM #08

Subject: Workload Analysis for FY, BY, BY+1

1 February 2000

1. **Purpose/Scope:** The purpose of this memorandum is to delineate the process by which the PM, Section Chief, PRB and Division Regional Management Board (RMB) accomplish resource planning for the Fiscal Year (FY), Budget Year (BY or FY+1) and the year beyond the Budget Year (BY+1 or FY+2).

NOTE: It is recognized that estimates for an organization's BY and BY+1 taskings will be based on less than optimum information. Nevertheless, even a rough estimate based on PSP, PMP, or other written document will be worthwhile in anticipating workload in the outyears and therefore useful in the analysis.

2. **Responsibilities:** The PMs and Project Teams will follow guidelines of the Division RPMBP for development of project level data to a section level including FY, BY, and BY+1. The Resource Forecasting Analysis will be executed by Section Chief, District and Division PRB, and Regional Management Board (RMB) on a quarterly basis to address management and reporting issues as described in Table 8-1. Quarterly triggers for action on out-of-balance resourcing are shown in Chart 8-1. Section Chiefs will be responsible to extract data from the regional database, analyze and determine scope, methods of accomplishment, cost and distribution for tasks identified by the project teams in FY, BY, and BY+1. The District PRB will resolve FY resource conflicts between PM and Section Chiefs. The Division PRB will resolve FY resource conflicts referred by District PRB. The RMB will be responsible to extract Division functional workload and resource data for FY, BY, and BY+1 from the Regional database and analyze foreseeable workload and resource problems for organizations or functions deviating from the limits on Chart 8-1.
3. **Procedures:** Section Chiefs will analyze workload extracts from the Regional database and determine how they can provide the requested products and services to the project teams by first scheduling task assignments to section employees. The level-of-effort calculation shown below directly addresses resource durations in the NAS. Real life indicates that USACE employees cannot devote 100% effort to one task on one project at a time. In order to provide better schedules to the project management team, and to provide better workload analyses to Section Chiefs, the following computation is provided to compute any given task's resource duration:

Regional Project Management Business Process

IMPLEMENTATION MEMORANDUM #08

Subject: Workload Analysis for FY, BY, BY+1

Operation	Hours	Explanation
Standard computations		
	2080	Hours in 52-week workyear
Deduct	80	10 Holidays/workyear
Hours remaining	2000	
Deduct	224	Hours lost to Annual or Sick Leave
Hours remaining	1776	Effective hours
Additional District-level computations		
Deduct	120	Hours charged to TI (training, etc.)
Hours remaining	1656	Direct chargeable hours
Deduct	236	Deduction for other factors (unanticipated new work, emergency work)
Hours remaining	1420	80% of 1776 hours

- a. A report showing rollups for function and organization workload for month or fiscal year is available. Considering the staff availability and capability, Section Chiefs will determine FY excess capacity or workload. As a rule, FY workload will be acceptable if within the upper and lower District limits shown on Chart 8-1. Eighty percent of the effective hours is the recommended target for an organization's annual workload. Some organizations may have higher or lower workload targets, but in no case should the annual workload be more than 100% of effective hours. In the example below, the first row is higher than the chart goal of 80% for first quarter FY, requiring more resources or smaller estimates. The second row is lower than the chart goal of 80%, requiring fewer resources or larger resource estimates.

Workload	Required FTE	Onboard FTE	Vacancies	Required Recruit
200%	6	3	2	1
50%	4	8	1	-5

Regional Project Management Business Process

IMPLEMENTATION MEMORANDUM #08

Subject: Workload Analysis for FY, BY, BY+1

-
- b. **Section Chiefs** will negotiate with **Project Managers** to change task scope or schedule in an attempt to resolve FY workload conflicts. For excess workload, the team may negotiate a reduction in scope or delay in schedule to better fit resource availability and capability. For excess capacity, the team can negotiate acceleration of scheduled tasks or conversion of AE contract tasks to in-house efforts.
 - c. **District PRB**: Any FY workload conflicts that still remain unresolved will go to the District Project Review Board (PRB) to determine if other alternatives are available to resolve the conflict. If the issue is excess workload, extra staff capacity in other Sections or Branches can be researched. If the issue is excess staff capacity, the District PRB can look for excess workload issues in other Sections or Branches. The PRB may also consider priority assignments and other conversion of AE contracts to in-house efforts.
 - d. **Division PRB**: Any FY workload issues that cannot be resolved at the District level will be referred to the Division PRB to analyze. Any function or organization deviating beyond upper and lower Division limits on Chart 8-1 will automatically be reviewed by the Division PRB after the District addresses the occurrence. The Division PRB will review District workload data obtained from the Regional databases and will consider District labor usage, AE contracting percentages, and program workload trends and forecasts prior to deciding course of action.
 - e. **RMB**: The RMB will review Division workload data obtained from the Regional database for FY, BY, and BY+1, and will consider labor usage, AE contracting percentages, and program workload trends and forecasts prior to deciding course of action. The RMB will make resource decisions for BY and BY+1 as follows:

Excess Workload Resolution:

- 1) Authorize original District to plan for recruiting vacancies and/or new positions based on long-term workload forecast projections.
- 2) Authorize other District to plan for recruiting based on long-term workload forecast or center of expertise considerations.
- 3) Assist in identifying other Districts projecting excess capacity and plan reassignment of workload.
- 4) Assist in identifying need for additional AE Contracts, other Division or other agency capacities.

Excess Capacity Resolution:

- 1) Coordinate reassignment of workload from other Districts that have excess workload.
- 2) Coordinate with other Districts to convert AE contracts to in-house workload.
- 3) Coordinate with other Divisions or other agencies that have excess workload.
- 4) Coordinate retraining and reassignment to fill other excess workload situations.

Regional Project Management Business Process

IMPLEMENTATION MEMORANDUM #08

Subject: Workload Analysis for FY, BY, BY+1

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- 5) Absorb excess capacity into departmental overhead costs based on long-term workload forecasts.
 - 6) Authorize Reduction-In-Force (RIF) actions.

Regional Project Management Business Process

IMPLEMENTATION MEMORANDUM #08

Subject: Workload Analysis for FY, BY, BY+1

Table 8-1. Resource Forecast Analysis

System, Process or Program	FY 1st qtr Oct - Dec	FY 2nd qtr Jan - Mar	FY 3rd qtr Apr - Jun	FY 4th qtr Jul - Sep	Responsible Parties
CW Budget Cycle	FY Allocations	Pres Budget (BY); HQ provides caps/limits (BY+1)	Field submit capabilities (BY+1), HQ reviews (BY+1)	Congressional mark up (BY); President signs BY; BY+1 to OMB	Program Development
MILCON Budget	Field submits lock-in const award dates				PM/SPD Military Prog
Mil O&M				End of year funding	Project Management
FORCON		BY, BY+1 FORCON Submission		PBAC: Op Budgets and FTE allocations based on BY FORCON	PBAC/Program Analyst
CRAMS		BY, BY+1 CRAMS Submission		PBAC: Op Budgets and FTE allocations based on BY CRAMS	PBAC/Program Analyst
HQ Military Programs	Previous year/qtr CMR	Previous qtr CMR	Previous qtr CMR	Previous qtr/Next year CMR	PM/SPD Military Prog
RMB review of Functional Rollups	Dec: RMB Review FY Resource Rollup, recommendations for FY	Mar: RMB Review FY/BY Resource Rollup, recommendations for FY/BY	Jun: RMB Review BY/BY+1 Resource Rollup, recommendations for BY/BY+1	Sep: RMB Review BY Resource Rollup, recommendations for BY	RMB/BOC
District review of Organization Rollups	Dist Review FY Resource Rollup, recommendations for FY	Dist Review BY Resource Rollup after FORCON submission, recommendations for FY/BY	Dist Review BY+1 Resource Rollup after BY+1 budget submission, recommendations for BY/BY+1	Dist Reviews BY Resource Rollup after conference report, recommendations for BY	PRB/Org Chiefs
District Regional update in addition to Monthly prog.adjust.	Dist adjust FY based on signed CW bill, allocations	District updates BY based on President's budget/Corps capability	District updates BY+1 based on BY+1 submission	District updates BY based on Conf Report	PM/Org Chiefs
District Unfunded Projects	Shift Unfunded projects out 1 year in accord with trend analysis				Program Analysts
Advanced Acquisition Planning	Project contract needs FY	Project contract needs year-end	Project contract needs BY	Contract year-end projects	Contracting

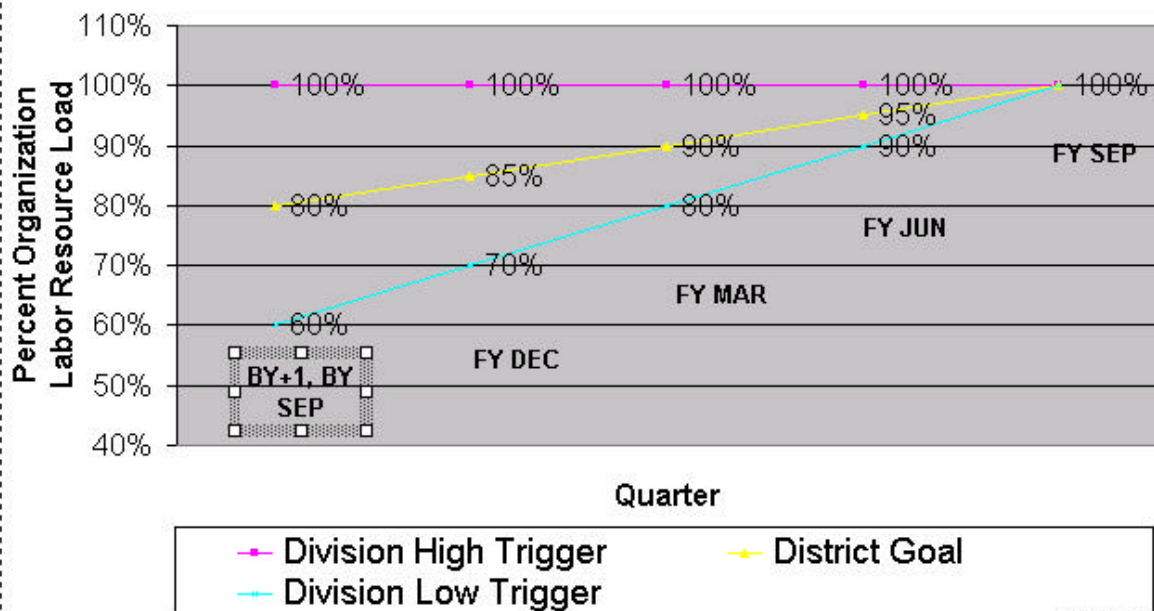
Regional Project Management Business Process

IMPLEMENTATION MEMORANDUM #08

Subject: Workload Analysis for FY, BY, BY+1

System, Process or Program	FY 1st qtr Oct - Dec	FY 2nd qtr Jan - Mar	FY 3rd qtr Apr - Jun	FY 4th qtr Jul - Sep	Responsible Parties
District PRB	Monthly update of Regional data	Monthly update of Regional data	Monthly update of Regional data	Monthly update of Regional data	Project Management
Environmental Program				Submit workplans	PM/SPD
Executive PRB	Previous year/qtr; project/program status	Previous qtr; project/program status	Previous qtr; project/program status	Previous year/qtr; project/program status	PPMD/SPD

Chart 8-1. Quarterly Trigger Values for FY, BY, BY+1 Workload Analysis



Regional Project Management Business Process

IMPLEMENTATION MEMORANDUM #09

Subject: Minimum District Reports

1 February 2000

1. **Purpose/Scope:** The purpose of this memorandum is to define the basic reports that have been determined as needed for implementation of the Regional Project Management Business Processes (RPBMP) at the District level.
2. **RPMBP Reports:** Below is a listing of the District reports that are being incorporated into the RPMBP system.
 - a. Generic Project Fact Sheet
 - b. Project Financial Statistics
 - c. Org./Section Financial Statistics
 - d. Milestones
 - e. Issues
 - f. Organization
 - g. Significant Events
 - h. Method of Accomplishments
 - i. Program Summary
 - j. Program Financial Statistics
 - k. Project Executive Summary/Project Review Board (PES/PRB)
 - l. Customer Satisfaction Reports
 - m. Advance Acquisition Procurement Board (AAPB) Reports
 - n. Total Labor Multiplier (TLM) Evaluation
 - o. Full Time Equivalency (FTE) Usage
 - p. Earned Value Analysis (EVA) Report
3. **Procedures:** All reports indicated above will run using the SPD RPMBP application. This application uses all Corps of Engineers' corporate databases: PROMIS, CEFMS, PRISM, RMS, and the RPMBP extract databases.

Regional Project Management Business Process

IMPLEMENTATION MEMORANDUM #10

Subject: Minimum Regional Reports

1 February 2000

1. **Purpose/Scope:** The purpose of this memorandum is to define the basic reports that have been determined as needed for implementation of the Regional Project Management Business Processes (RPBMP) at the Regional level. The reports will provide the capability of reviewing data across all Districts within the Region in a consolidated format.
2. **RPMBP Reports:** Below is a listing of the Regional reports that are being incorporated into the RPMBP system.

Minimum Regional Report Elements

- a. District Boundaries
- b. Congressional Statistics
- c. Program Statistics
- d. Program Manager
- e. Project Phase
- f. Milestones
- g. Organization Data
- h. Functional Data
- i. Financial
- j. Issues/Resolutions
- k. Method of Accomplishments
- l. Local Sponsor Commitments
- m. Resources
- n. Fiscal Year
- o. Supervision and Administration (S&A)
- p. Overhead
- q. Earned Value Analysis (EVA)
- r. Mission

Minimum Regional Reports

- a. Water Resources Data Act (WRDA) Fact Sheets
- b. Congressional Fact Sheets

Regional Project Management Business Process

IMPLEMENTATION MEMORANDUM #10

Subject: Minimum Regional Reports

- c. General Fact Sheets
 - d. Justification Sheets
 - e. New Start General Investigations (GI) Fact Sheet
 - f. New Start Construction General (CG) Fact Sheet
 - g. Project Data Sheets
 - h. Grunt Sheets (PRISM)
 - i. Command Management Review (CMR)
3. **Procedures:** All reports indicated above will run using the SPD RPMBP application. This application uses all Corps of Engineers corporate databases: PROMIS, CEFMS, PRISM, RMS, and the RPMBP extract databases.

Regional Project Management Business Process

IMPLEMENTATION

1 February 2000

1. **Implementation Strategy:** RPMBP implementation across South Pacific Division will not be a simple task, but will result in substantial benefits that make it worth the necessary time and resources. Implementation will require a significant cultural adjustment with standardization of process, tools and reports across the four Districts and the Division office. Project managers, technical team members, Section Chiefs, District managers, and Division managers will all have to learn new roles and responsibilities and means of communicating effectively across the Division to execute the Regional Business Center workload. The Process Action Team has created the basis and groundwork for implementing RPMBP. However, constant and persistent management attention will be required to make this a successful initiative. RPMBP implementation in South Pacific Division will directly involve hundreds of people and indirectly all others. Management attention, leadership and support to the staff through these changes will be key in making this a successful initiative.

On 11 Jan 2000, SPD staff and the Districts agreed on the presented concepts and draft RPMBP SOPs. District Commanders will now have to lead their organizations in the development and execution of District RPMBP Implementation Plans. The following Management directives are recommended to assure involvement at all levels:

- a. BG Madsen memorandum to all SPD District Commanders adopting RPMBP and setting the objectives, goals, and milestones:
 - By the end of FY 2000, all Districts will be expected to have an Implementation Plan in place and the first iterations of data for ALL work entered in the PROMIS database for FY 2001 execution.
 - Starting October 2000, the Regional Management Board will be using data from the data systems to make active workload and resource decisions.
 - By March 2001, iterations of project data development and workload and resource analysis will reflect accurate forecasts for FY 2002 manpower requirements and will be used for FORCON and CERAMMS data queries.
 - By March 2001, iterations of project data and workload analysis will reflect accurate execution plans for FY 2002 and budget requirements for 2003.
- b. By March 2000, RMB memorandum establishing a RPMBP Technical Committee and Technical Committee Chair to direct and oversee the development and implementation of the Regional database and reports.
- c. District Commanders' memoranda establishing District Implementation Plans and Implementation Teams.
- d. District DPM and Technical Chief memoranda to staff amending performance objectives to include RPMBP milestones.

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The business process changes will take a concerted effort at each District to assure all work is managed with scope, schedule, and resource requirements entered into the PROMIS database. Workload and resource management will now involve elements from the District Section Chiefs, District PRB, Division PRB and the Regional Management Board. Division staff will need to manage implementation of the Regional Database and reports as a coordinated effort involving all the Districts. Accordingly, implementation of RPMBP can be separated into two distinct elements – Regional Business Processes and Regional Database System and Tools.

2. Regional Business Process Implementation

Division Implementation:

Division and Regional actions will need to be constant and persistent. Division shall establish a Project Management position during the implementation phase to support the District's and Division in establishing the Regional Business Center. Division support to the Districts will be required during implementation to include participation in District townhall meetings, brown bag lunches and workshops. SPD District Support Teams and Division PRB can also assist in verification of project data in the PROMIS databases. The RMB will need to establish the Technical Committee who will design and review regional reports during the data entry phases to help identify potential problem areas and assist Districts in workload issue resolution. Starting in October 2000, the Division PRB and RMB will formally review regional project and workload reports and consolidate the District execution plans into a Division, Regional Business Center, execution plan.

District Implementation Schedule:

Implementation of new business plans at the Districts will require iterative cycles of communication, training, team meetings, data entry, and project data verification and workload analysis reviews. Districts should establish an implementation team and plan. A suggested milestone schedule for a District's plan could include:

Regional Project Management Business Process

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Suggested Milestone Schedule

Jan/Mar 00	Communication Training Training Communication	RPMBP Initial Concept Training and Communication Individual SOP Review Sessions PROMIS User “How To” Training Roles and Responsibilities Townhall (PM/Team/Sec Chief)
Mar/May 00	Team Meetings Data Entry Communication Training Communication	Team Meetings (FY 00 & 01 Scope, Sched & Res Estimate) PROMIS Initial Data Load All Work Provide Example Required Data Establish Help Center for User Problem Resolution Brown Bag Lunch Feedback Sessions
May/Jul 00	Verification Training Training Data Entry Communication Training Communication	Project Data Review and Verification Workshop on Unique Programs - All work in PROMIS Workload Management “How To” Training Section Initial Workload Balancing FY 01 Provide Example Required Data Establish Help Center for User Problem Resolution Brown Bag Lunch Feedback Sessions
Jul/Sep 00	Verification Team Mtgs Data Entry Data Entry Verification	Organization Workload Review (FY 00 and 01) Team Meetings (FY 01 execution plan) PROMIS Load (ALL Work) / Revise Data Section Workload Balancing Project / Workload Data Verification (FY 01 execution plan)
Sep/Nov 00	Communication Training Training	Employee Survey (feedback) Help Center / One on One assistance SOP / PROMIS / Workload Analysis Review Sessions
Nov/Jan 01	Team Mtgs Data Entry	Team Meetings (FY 01 & 02 scope, sched & resource est) PROMIS Data Load (ALL work)

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Jan/Mar 01	Verification Data Entry Verification	Project Data Review and Verification Section Initial Workload Balancing Project / Workload Data Verification (FY 01 execution review and FY 02 initial plan)
Mar 01	Team Mtgs Data Entry Verification Data Entry Verification	Team Meetings (FY 01, 02 & 03 scope, sched & resource est) PROMIS Data Load (ALL work) Project Data Review and Verification Section Workload Balancing Project / Workload Data Verification (FY 01 execution review, FY 02 execution plan, FY 03 initial plan)

Starting in October 2000, the RMB will be using data from the Regional Systems to make workload and resource decisions.

3. Regional Database System And Tools Implementation

- a) This section establishes the procedures for managing changes to the database, data structures and data queries. These procedures are applicable to the **Users**, the **RPMBP Technical Committee**, the **System Developer**, and the **System Administrators**.
- The **RMB** (Regional Management Board) will have oversight over the RPMBP processes and tools in use throughout the South Pacific Division.
 - The **RPMBP Technical Committee** will consist of members appointed at the discretion of the RMB. The **RPMBP Technical Committee** will have a Committee Chair who is also a member of the RMB, and will be composed of two members from the Division and each District, for a total of ten (10) members. The members of the committee will be selected from members of the South Pacific Division staff, the RPMBP user community in the districts of the South Pacific Division, and members of the Information Management (IM) community. The technical committee is responsible for the oversight and review of the RPMBP and tools.
 - The **System Developer** team will be composed of members of the IM community, Subject matter experts when required, and contract personnel required to develop the RPMBP tool.
 - The **System Administrator** team will consist of personnel assigned to the IMO of the District responsible for the operations and maintenance of the RPMBP tool web server and database (currently the Sacramento District). The membership of the System Developer team and the System Administrator team may overlap.

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- b) The **User** will submit any requests for system changes to the **RPMBP Technical Committee** through the “**Contact Us**” section of the RPMBP website. Any request for additional reports will have a description of the report, the purpose or use of the report, an identification of the RPMBP business process the report supports, a sketch of the proposed report layout, a list of the data required in the report, and if necessary, the computations for derived data. The user should also communicate the urgency of the request. The RPMBP Technical Committee may request the user to provide funds to perform the work. All requests for ad-hoc queries or custom reports will be submitted to the RPMBP Technical Committee. No customizing or tailoring of the RPMBP tool will be permitted without prior Technical Committee approval and oversight.
- c) The **RPMBP Technical Committee** will review and prioritize proposed changes to the system received from the users, the RMB or the System Administrators to determine if the proposed changes affect the RPMBP, the RPMBP tools or both. The Technical Committee will estimate the potential work required for the tool and provide the recommendations to the RMB for resource allocation. The **Chair** of the Technical Committee will submit to the RMB an annual work program, adjusted quarterly, for approval and resourcing. If the changes affect the RPMBP Business Processes, the RPMBP Technical Committee will prepare suggested changes to the RPMBP SOPs for RMB approval. If the changes affect the RPMBP tools, the RPMBP Technical Committee will prepare specifications for system changes to the **System Developer** or the **System Administrator** using the IMO Work Order Request and Agreement Form. The **Technical Committee** will develop the draft proposed Business Process changes, keep the originator of the request informed on the progress or status of the change, and manage the cost and schedule of any system change work. If technical or resource problems arise, the Technical Committee may suspend further development work and reevaluate the change request. On completion of business process revisions and accompanying implementation plans, the **RMB** will review the results and enact those revisions. On completion of system changes, the **Technical Committee** will review and enact those system changes.
- d) The **RPMBP System Developer** or **System Administrator** will accept work from the RPMBP Technical Committee through the IMO Work Request and Agreement and ensure that the information provided is sufficient to complete the assignment. The person accepting the work will provide a preliminary estimate of the time and resources required for the work. If the amount of work is small, the System Developer or System Administrator should select a single developer who will be able to report the progress or status of the work to the **Technical Committee**. If the work has been assigned to a team or group, a POC or leader for that team or group will be designated to communicate with the Technical Committee. Planning and implementation for upgrades and changes to the installed hardware and software for the RPMBP System will be managed through the Corps IT planning process through SPD’s Information Management Division.

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- e) The **RMB** will review the work program of the RPMBP Technical Committee and approve and provide resources for the work program of the Technical Committee. They will review and approve changes to the RPMBP Business Process SOPs submitted by the Technical Committee, and will review the progress and status of the Technical Committee Work Program.

4. **Cost of RPMBP Implementation:** Cost for implementing RPMBP is comprised of two parts; the cost of implementing the business process and the cost of the Regional Database and reports implementation. RPMBP implementation in South Pacific Division will directly involve hundreds of people and indirectly all others. However, the cost associated with the change in business process is not an added cost but a change in effort for the same cost. When we are considering whether to change our current business process the question is “what is the cost of not making the RPMBP changes.” The estimated cost of \$800,000 for development and maintenance of the Regional Database and reports is identified in the table below:

ITEM	HRS	WEEKS	HOURLY RATE	INDIVIDUAL'S TOTAL	TOTAL NO.	TOTAL SALARIES
ONE TIME DEVELOPMENT COSTS						
DEVELOPMENT TEAM	30	12	\$30.00	\$10,800.00	1	\$10,800.00
HARDWARE (Local Processing Center)						\$60,000.00
SOFTWARE						
CONTRACT SERVICES	40	12	\$50.00	\$24,000.00	3	\$72,000.00
TOTAL COSTS FOR IM DEVELOPMENT						\$142,800.00
RECURRING COSTS						
SYSTEM ADMINISTRATOR	8	52	\$30.00	\$12,480.00	1	\$12,480.00
SYSTEM DEVELOPERS	40	52	\$50.00	\$104,000.00	2	\$208,000.00
						\$220,480.00
ANNUAL COSTS THROUGH 2002					3	\$661,440.00
		FY 2000	FY 2001	FY 2002		
		\$363,280.00	\$220,480.00	\$220,480.00		\$804,240.00

U.S. Army Corps of Engineers

South Pacific Division



Regional Project Management Business Process

Terminology and Definitions

Draft Version 1

1 February 2000



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Common PROMIS Terms

Actual Costs	PROMIS reads actual costs from the expenditures recorded in CEFMS. In the Actual Cost dialog, you can view the total cost for all work items associated with the selected task. To view actual cost by work item and selected task, review the Actual Cost report.
Army Corps of Engineers Project	A project is defined as a piece of work undertaken by the Corps to improve or enhance an existing condition or problem where a Federal interest in the solution exists. It is generally, but not always, funded by a single line item on the Congressional appropriation bill. Projects generally involve study of the existing condition, design of an implementable alternative solution, and construction of a facility in accordance with the approved design.
CEFMS Data Link	To call this PROMIS dialog from the main menu, choose Function, Financial, then Initial Data Link. This dialog will display the work items and the children (that is, only the children of the work item considered by PROMIS to be the parent work item) that have been created in CEFMS and coded into PROMIS through the SA Utility. All work items coded into PROMIS should be observable in the upper right-hand box of the Project Identification dialog. This dialog allows the user to link specific work items to resourced tasks. As long as the User does not invoke the PROMIS Resource Plan to “hard-link” work items with organizations in PROMIS tasks, the links can be later broken. Resource estimates and their associated tasks cannot be deleted once work items and organizations are hard-linked through the PROMIS Resource Plan.
Classification	In PROMIS, a project manager must classify civil and military tasks before entering resource estimates into those tasks. HTRW project tasks do not require classification. In general, classification includes entering information on the type of project and funding sources. See PROMIS-Civil and PROMIS-Military for more details.
Commitments	Commitments are reservations of project funds to cover a scheduled obligation and/or expenditure. A user can use a Purchase Request and Commitment (PR&C) as a vehicle to reserve funds. Commitments are created when the PR&C is certified. In Military projects, commitments must be created before the Lock-In date or project funds will be lost.
Contingency	Contingency is additional funds added to a resource estimate to account for conditions which occur during execution that were unforeseen during the planning of the project. Contingencies can be added into the Resource Estimate dialog for each task.
Customer Information	In PROMIS, the Project Identification dialog contains a “Customer” button to call out the Customer Information dialog. This dialog prompts the project manager to provide detailed information on the customer. See PROMIS-Civil , PROMIS-HTRW , and PROMIS-Military for more details.
CWIN	A Corps Work Item Number is assigned to the project in the Project Registration dialog of the SA Utility if it is upward reportable to Headquarters. That number can be referenced from the authorizing document. See PROMIS-Civil .

Drag and Drop	<p>With drag and drop (see merge), the User positions the mouse cursor on a source folder on the WBS window, depresses and holds the left mouse button while moving the cursor to a destination folder. The User releases the mouse button when the cursor arrives at the new location. The behavior depends upon which window contains the destination folder:</p> <p><u>Same Window</u> - If the destination folder is in the same window as the source folder, the source folder is moved and attached as the last child of the destination project, subproject, or task folder on which it was dropped. If the source folder has children, those children will also be moved and inserted under their parent folder. The User can copy the folder by depressing the Ctrl key before dragging to a new location.</p> <p><u>Different Window</u> - If the destination folder is in a different window than the source folder, the source folder is copied (duplicated) and attached as the last child of the destination project, subproject, or task folder on which it was dropped. As before, if the source folder has children, those children will also be duplicated and inserted under their parent folder.</p>
Expenditures	<p>Expenditures are incurred as the obligations are satisfied (that is, commitments are met) and the funds are disbursed to the appropriate party that uses a funded work item as the vehicle.</p>
Identifier Number	<p>Every new project in PROMIS is assigned an identifier number. This number can be viewed in the Project Identification dialog.</p>
Issues Comments	<p>Under the PMBP requirements for reporting to the Project Review Boards, project managers should prepare comments that address project issues and customer concerns. Include a description of the impact, if any, on the schedule, budget, milestones, and customer commitments. Describe the action taken/required to resolve the issue. Limit the text to 2500 characters or one-half page of typed narrative. The comments dialog that includes the issues option can be called out from the Project Identification dialog.</p>

Merge	<p>PROMIS allows the User to merge one project version into another using a technique similar to the standard drag and drop. The User positions the mouse cursor on a source folder on the WBS window, depresses the Alt key, depresses and holds the left mouse button while moving the cursor to the destination project version window. The User releases the mouse button when the cursor arrives at the new location and then releases the Alt key. There are two purposes for merge; to create a brand new version from an existing project version, or to update a "primary" version from a "delegated" version. From a user-interface viewpoint, the only difference is the source folder being "dragged and dropped." This is explained below:</p> <p><u>New Version</u> - The User has an existing (perhaps model) project plan, which contains a WBS tree, resource estimates, and schedule information. They wish to duplicate the entire project plan into a brand new version. In this case, the User would open the (model) project version and the destination version. The merge is performed at the project folder level, i.e.; the project folder is dragged onto the new version as described above.</p> <p><u>Delegated Version</u> - The project manager has delegated a branch of a given project version to one of the other team members, and given that team member a copy of the version. For the sake of clarity, the original version is called the primary version, and the other the delegated version. The person responsible for the delegated version would open that version, modify the branch of the WBS for which they have authority, and then save the delegated version. The project manager would then open the primary and delegated versions. The project manager would then merge the appropriate branch of the delegated version into the primary version. The merge is performed at the task folder level, for example, a task folder would be dragged onto the primary version as described above.</p>
Milestone	<p>In PROMIS, a milestone is a start or finish date for a specific task. Some milestones are upward reportable to either Headquarters, the Project Review Board, or the Customer. Mandatory upward reportable milestones are listed in the PMBP User Manual. In PROMIS, a milestone can be inserted into the work breakdown structure as a task with the associated start or finish milestones connected to that task through the milestone list dialog. In addition, milestones must be connected to the appropriate work breakdown structure code of that associated task. Every milestone has a specific code.</p>
Network Analysis System (NAS)	<p>PROMIS interfaces with commercially available Network Analysis System (NAS) software for scheduling purposes. This allows the User to send applicable tasks to the NAS for scheduling. The required interface includes Open Plan, Microsoft Project, Primavera, and SureTrac.</p>
NAS Activity	<p>A User can identify a task as an NAS activity by marking a box in the Task Identification dialog. PROMIS recognizes NAS-marked tasks and exports them to the NAS software for scheduling. PROMIS will also color blue those NAS-marked WBS folders.</p>
Obligations	<p>Obligations are created when the acquisition documents are approved and the funds are obligated for future use (that is, the funds are then made available to allow for the creation of purchase requests).</p>

Parent and Child Tasks	A parent task is any task that has a child or subtask. Depending on the context of the work breakdown structure, a parent task can be a child task to another parent task. Or, from another viewpoint, a child task can be a parent task to a lower level child task. Parent and child tasks must be discussed in a relative context within the work breakdown structure.
Procurement Products	Procurement Products include those activities required to solicit and review bids from, and award contracts to contractors. These activities can include advertising the request for a bid, the bid opening, awarding the contract, and issuing the notice-to-proceed.
Project Version	A version is a user-defined connection of project scope, schedule and cost which completely defines the project at a given point in time. Projects generally involve many versions over their life cycle. The history of the project can be identified by comparison of its versions over its life cycle. To compare versions through the Version Comparison dialog, open both versions and choose Function, Change Management, then Compare Versions. One of the versions must be designated as the official version.
PROMIS	PROMIS is an ISMP project, which supports major portions of the business practices of programs and project management throughout the Corps. PROMIS provides a standardized, integrated information system to support management of projects and their allocated resources. PROMIS projects fall within the Corps primary missions; Civil Works, Military Programs, and HTRW Clean Up. PROMIS capabilities allow managers to identify and track project scopes, schedules, budgets, costs, contracts, modifications, and technical performance requirements. This simplifies managing and controlling individual projects through planning, design, construction, and initial operations. PROMIS also derives the aggregate data from individual projects for use in the congressional budgetary and programming processes of the Corps.
PROMIS System Administrator (SA)	The PROMIS System Administrators are responsible for meeting several operational and maintenance requirements of PROMIS. The requirements consist of registering projects, designating project managers, identifying authorized PROMIS users, identifying the roles of users, unlocking "locked" versions, restoring and deleting back-ups, and maintaining referential data.
Referential Data	A collection of frequently used data containing predefined lists of valid values such as Location Congressional Districts, Add Basins, Set Basin Locations, Add Installations, Resource Codes, Milestones, etc. When opening PROMIS, the software will indicate to the user that the referential tables are being updated. The PROMIS user may not modify referential data.
Resource	A resource is a mechanism required to execute a task or project. Resources may include manpower, materials, equipment, travel, etc. Resources are generally consumed in the execution of the project.

Resource Estimate	In PROMIS, the Resource Estimate dialog allows the User to estimate the resources required to execute the tasks associated with the active project WBS. Resource estimates may not be entered at the project level or subproject level. After entering resource estimates for a task, another task can be selected without closing the dialog. The name of the new task is displayed at the top of the dialog. This dialog will prompt you to enter the organization, resource type (e.g. A-E Services, Labor, etc.), employee name (if necessary, but not required), method of accomplishment (e.g. Contract – Outside Government, In House – Labor, etc.), Units (e.g. hourly, lump sum, etc.), Quantity, Rates, Contingency, and any indirect or overhead overrides.
Schedule	The schedule establishes the start and finish dates of each activity, displays the duration of each activity, and defines the sequence of activities required for project execution.
Synopsis Comments	Under the PMBP requirements for reporting to the Project Review Boards, project managers should prepare a brief description of the overall project including location, setting, and proposed project features. A Synopsis Comment can be later modified, but not deleted. Limit the text to 2500 characters – about one-half page of typed narrative. Keep it simple and to the point. If desired, use copy and paste from the sources such as the “Fly Sheet.” The comments dialog that includes the synopsis option can be called out from the Project Identification dialog.
Tasks	A task is a component of the total project. Execution of the tasks included in a project comprise execution of the project. In PROMIS, a task is a folder in the Work Breakdown Structure.
Template Item Code	In PROMIS, Headquarters assigned each civil, HTRW, or military task a corresponding template item code. Specific codes should correspond to appropriate milestone codes. Appendices A, B, and C in the “Ticket to PROMIS” manual contains listings of template item codes and corresponding milestone codes.
Work Breakdown Structure (WBS)	A Work Breakdown Structure (WBS) is a hierarchical tree structure used by project managers to decompose a project into manageable tasks. In PROMIS, a Work Breakdown Structure (WBS) is composed of folders and folder names depicting the project and its subordinate tasks and subprojects (also called children) in a hierarchical structure. The top level of the WBS is defined as the project. PROMIS includes the capability to create, save, and display a project specific WBS from standard and/or customized templates.
Work Breakdown Structure (WBS) Templates	<p>WBS Templates provide a guide to the User in developing a project-specific WBS as well as ensuring the User has considered all regulatory requirements in planning the project. PROMIS provides both Standard templates and Customized templates.</p> <p><u>Standard:</u> Headquarters formed task groups of field personnel to develop standardized WBS templates for Civil Works, Military Programs, and HTRW projects. These templates have been incorporated into PROMIS and are available for use in developing a WBS for the project. In addition, the HQ Standard WBS templates can be used to develop Customized WBS templates.</p>

	<p>Customized: Similar types of projects typically follow the same procedures and processes over their life cycle. The WBS structures developed for similar projects would generally be nearly identical. For example, a Civil Works Navigation project generally involves the same tasks as any other Civil Works Navigation project. Likewise, a Military Barracks project is virtually the same as any other Military Barracks project. Thus, the system includes the capability for the users to build customized WBS templates for similar projects.</p>
Work Item	<p>A work item is the mechanism in CEFMS by which funds can be managed and organizations can expend funds. Work items are assigned specific codes and can be associated with one or more organizations across one or more tasks. PROMIS can create work items in CEFMS, and can link CEFMS-created work items to PROMIS organizations and tasks. Ideally, no more than one organization should be associated with each work item. Work items can also have associated child work items. Not all work items have to be funded. Before PROMIS can link with work items in CEFMS, or create work items in CEFMS, project or parent work item(s) created in CEFMS must be entered into the Systems Administration (SA) Utility. This work item(s) will be observable in the PROMIS Project Identification dialog. This same work item(s) and its children, if any, are observable in the PROMIS initial data link dialog (that is, only the children of the work item considered by PROMIS to be the parent work item).</p>

PROMIS – CIVIL

Accounting Feature	Accounting features define the type of facility or area of civil work to be performed. These features are displayed in the drop down dialogs when a User classifies a task. Types of work or areas can include bank stabilization, channels and canals, dams, locks, reservoirs, S&A, etc. See Permanent Feature below.
Classification	Civil project tasks must be classified before resource estimates are entered in PROMIS. Task classification includes entering the Federal Budget Appropriation, Phase, Features, Feature Account, and Line Item Descriptions. Additional buttons in this dialog lead the project manager to enter information on Category Class and Subclass, Funding Sources, and Permanent Features. The Category Class and Subclass button (Cat-Class-Sub) is not activated until the Federal Budget Appropriation and Phase are identified. Funding sources can be federal, non-federal, and/or other federal agencies.
Customer Information	The Civil Project Identification dialog contains a “Customer” button to call out the Customer Information dialog. This dialog prompts the project manager to provide detailed information on the customer such as name and address, the customer’s project number, and information of the local point of contact (POC).
Customer Primary Task	In the Task Identification dialog, a User has the option of identifying a task as a “Customer Primary Task, ” that is, a task that a customer considers important enough to monitor its status. If the User chooses to mark this box, that task and its schedule will be included on the Civil Project Review Board Report as a Commitment to Sponsors. A project manager should select 3-5 tasks for the current fiscal year and designate them as local sponsor commitment tasks.
Civil Works Identification Number (CWIN)	The CWIN is generated by HQUSACE to identify and track civil works projects. If a project has no CWIN, and cannot be linked to another existing CWIN, the Systems Administrator (SA) electronically requests a CWIN from HQUSACE through the PROMIS SA Utility.
Permanent Feature	Permanent features are defined as Accounting Feature 1 through 20 and are related to types of physical facilities constructed at the civil project site. This dialog is called from the Permanent Feature button on the Civil Classification dialog. The Permanent Feature button is only activated if the selected Feature is Preconstruction Engineering and Design (Feature 30), or Construction Management (Feature 31).
Project SubType	In the Project Registration dialog of the SA Utility, choosing Civil as a project type will force a user to choose a project subtype, since Civil projects can be either Civil Standard Projects, Continuing Authorities Program (CAP), or O&M.

PROMIS – HTRW

BRAC-ER	Base Realignment and Closure Environmental Restoration programs are directed toward performing HTRW-type projects at military installations designated for closure.
Classification	HTRW project tasks do not require classification in order to enter resource estimates and track them in PROMIS. The “classify” button in the Task Identification dialogs is not activated for HTRW projects. However, the “detail” button in the Project Identification dialog will take a User to a “HTRW Program Type” dialog that requests information on the Primary and Secondary type of work that is being performed. This dialog also contains a “classify” button that leads you to an “HTRW Classification” dialog requesting information on Work Group and NPL status. PROMIS does not require that data be entered into dialogs under “detail” in order to track the project. These dialogs are optional.
Customer Information	The HTRW Project Identification dialog contains a “Customer” button to call out the Customer Information dialog. This dialog prompts the project manager to provide detailed information on the customer such as whether its a major command or other agency, name and address, the customer’s project number, information on the local point of contact (POC), and project number formats.
FUDS	Formerly Utilized Defense Sites is an HTRW program which manages the environmental clean-up of inactive areas and facilities located on active and closed bases.
FUSRAP	Formerly Utilized Sites Remedial Action Program is a former Department of Energy (DOE) program that the Army Corps of Engineers (COE) now manages. Under this program, the COE now manages the environmental assessment and clean-up of former nuclear weapons-related facilities that provided services or products to the Atomic Energy Commission (AEC), Energy Research and Development Agency (ERDA), and DOE.
IRP	Installation Restoration Program projects are directed toward performing HTRW-type projects at active military installations.
PA/SI	Under HTRW, PA/SI refers to Preliminary Assessment and Site Inspection. Preliminary Assessments (PAs) involve the collection and analysis of historical, government, and other available records, and the performance of a site reconnaissance in order to assess the area/property for environmental concerns. No site materials are sampled during this phase. The results of a PA are used to determine if either any physical sampling of site media or no further action is warranted. Site Inspections (SI) involve the collection and analysis of site media such as soil, ground water, or surface water to assess if an area/property has been environmentally impacted. The data collected during an SI is not sufficient to plan a clean-up or design a remediation system. Depending on the results of the SI, either a remedial investigation or no further action may be warranted.
Project Funds Type	In the Project Registration dialog of the SA Utility, choosing HTRW or Other as a project type will force a user to choose a project funds type, since HTRW and Other projects can be funded from either civil or military funding sources.

Project Number Format	<p>HTRW Customer organizations have their own internal system for tracking projects. The Customer's Project Number edit control in the HTRW Customer dialog allows the Project Manager or Proxy to enter the Customer's project number (i.e., link the PROMIS Project to the HTRW Customer's internal project number).</p> <p>Selection of the Format button on the HTRW Customer dialog calls the Project Number Format dialog. This dialog displays example HTRW Customer Project Numbers such as for Superfund, FUDS, Air Force, or Army.</p>
RA	<p>The Remedial Action (RA) takes place after the Remedial Design, that is chosen through the Feasibility Study, is prepared and approved. In Civil and Military projects, this task is similar to the execution of the Construction Contract.</p>
RD	<p>The type of Remedial Design (RD) to pursue is chosen through the Feasibility Study.</p>
RI/FS	<p>A remedial investigation involves a detailed physical and chemical characterization of a site through the sampling and analysis of on-site media such as soils and ground water. The information obtained in the RI phase should be sufficient to allow reasonable feasibility studies (FS) that review and test on paper different potential remedial designs.</p>

PROMIS – MILITARY

Classification	Military project tasks must be classified before resource estimates are entered in PROMIS. Task classification includes entering the Work Category and Work Group. An additional button in this dialog leads the project manager to enter information on Funding.
Current Working Estimate (CWE)	This is a military-specific term used to describe the most up-to-date budget estimate of the project as entered by the Resident Engineer into the Resident Management System (RMS). It includes contract costs, variances, supervision and administration, and other financial data that have a bearing on the total cost of the project. Before entering basic data into the CWE dialog, the project manager must <u>classify</u> the tasks and enter data in the Funding Source dialog called from the Classification dialog. Once a contract has been awarded, the RMS will populate the CWE dialog. After the contract is awarded, all information in the CWE dialog will be read-only.
Customer Information	The Military Project Identification dialog contains a “Customer” button to call out the Customer Information dialog. This dialog prompts the project manager to provide detailed information on the customer such as type (e.g. MACOM, Installation, Communication, Environmental, or Resident Engineer), name and address, the customer’s project number, and information on the local point of contact (POC).
Directive Number and Date	Every military project is assigned a directive number and date for tracking purposes.
Lock-In Date (Construction Forecast Award Date)	This date identifies when a construction contract must be awarded before funding for that construction work is removed. In general, a project usually begins well before the Lock-In Date. The Lock-In Date, called the Construction Forecast Award Date in PROMIS, can be viewed from the Military Project Status dialog, which is called out from the Military Project Detail dialog. The Detail dialog can be called out from the Project Identification dialog.
Lost Design	Lost Design is a design that has been scrapped and/or redone prior to award of a construction contract because of changes in the scope of a project, criteria, weapon system requirement, design error, or any other reason that invalidates portions of a design. Design of an unawarded construction contract additive bid item is included as lost design. Design changes that do not result in increased design cost, and value engineering (VE) studies and any modification costs related to a VE study are not included as lost design. In PROMIS, the estimated loss of funds due to lost design can be inputted into a task. (ER 1110-3-111)
S & A Default	In only military projects, the project manager can choose to change the Supervision and Administration default percentage. To access this dialog to make this change, choose Options from the main menu, then Defaults, then S & A Percent.

MICROSOFT PROJECT TERMS

Activity Ties	<p>Project scheduling allows four types of ties: Finish to Start (FS), Start to Finish (SF), Finish to Finish (FF), and Start to Start (SS). Examples of these are provided below:</p> <p><u>Finish to Start</u>: Activity A, which sets concrete forms, is tied FS to Activity B, which pours concrete. The forms must be set before concrete is poured.</p> <p><u>Start to Finish</u>: Activity "A" involves running conduit. Activity "B" involves pulling the wire. Activity "B" is tied to Activity "A" as Finish to Start. No differences exist between this tie and the FS tie, and it is used rarely.</p> <p><u>Start to Start</u>: Activity "A" involves framing a house. Activity "B" involves framing the house next to it. Since you will have enough materials and carpenters to frame both houses, you tie them Start to Start.</p> <p><u>Finish to Finish</u>: Activity "A" involves painting the interior of a house. Activity "B" involves painting the exterior of the house. You need them to finish at the same time for inspection purposes. They would be tied Finish to Finish.</p>
Baseline	A baseline is a record or "snapshot" taken at a specific time in the project. A user can save project data as a baseline to compare with future versions to observe schedule or resources changes. In PROMIS, users do not generally save their newest schedule and resource data to a baseline.
Critical Path	The critical path is: 1) The shortest path in a schedule from the start of a project to project completion, and 2) A path of zero or negative float activities from the start of project to project completion (Note: based on this definition, you can have more than one critical path).
Float (Positive and Negative)	<p>Positive float is the amount of time an activity can move forward in time until it effects the project finish date (e.g. If activity "A" is scheduled to finish on day 8 of a project and the project finishes on day 10, that activity has 2 days of positive float).</p> <p>Negative float occurs when an activity's finish date is beyond the project finish date, or its successor activity's finish date (i.e.: If after scheduling a project, activity "A" has a finish date of day 10, but the project is scheduled to finish on day 8, that activity has 2 days of negative float).</p>
Gantt Chart	A Gantt chart shows a list of tasks and related information, and an accompanying chart that shows tasks and their durations over time. When PROMIS routes to MS Project for scheduling, the Gantt chart is the default view. A user can enter and schedule tasks in this view.

Lead and Lag Time	Adding Lead Time creates an overlap in the task dependency that can shorten the project duration. Adding Lag Time creates a delay, or gap, in the task dependency that can lengthen the project duration. That is, lead time moves the start of the successor task back in time, and lag time moves the start of the successor task forward in time. Therefore, in the MS Project Lag field, lead is displayed as a negative number and lag is displayed as a positive number.
Milestone	In scheduling, a milestone is simply a task with a duration of zero, and represents a significant point in time (due date) on the schedule.
MPX File	MPX is a universal file format that PROMIS and other softwares can read. When you complete your scheduling in Microsoft Project, save your work as an MPX file, not an MPP file. PROMIS will read your MPX file and import and populate itself with schedule data from MS Project.
Predecessors (Task Dependencies)	Predecessors set the specific chronological relationship between two or more tasks. Relationships (activity ties) include Start To Finish, Finish to Start, Start To Start, and Finish To Finish.
Predecessor Activity	An activity that must start or finish before a follow-on activity can start.
Successor Activity	An activity that cannot start until the activity before it starts or finishes.
Task Constraints	In the Advanced dialog called from the Task Information dialog, the User can indicate eight different types of task constraints including: As Late As Possible, As Soon As Possible, Finish No Earlier Than, Finish No Later Than, Must Finish On, Must Start On, Start No Earlier Than, and Start No Later Than. Changing this setting will establish a specific relationship between the chosen task and other tasks and dates.

CEFMS TERMS

Commitments	See Common PROMIS Terms.
Expenditures	See Common PROMIS Terms.
Funded Work Item	This is a work item that has been allocated monies from the funding sources of a project. Work items can be funded only through CEFMS. PROMIS can distribute budgets, but not actual monies.
Method of Accomplishment (MOA)	This is the method used to fill a purchase request for goods and/or services. MOAs are identified by three sets of codes for: Contractual, Training, and Miscellaneous Requests; Government Order Requests; and In-House Requests.
Obligations	See Common PROMIS Terms.
Ordering Work Item	An unfunded work item used to create a hierarchy among or between other ordering or funded work items.
Purchase Requests and Commitments (PR&Cs)	Purchase requests must be created in CEFMS in order to secure and commit to funds available to a project for goods and services. Each purchase request must identify the method of accomplishment. The user then can approve the request. Then a financial manager certifies the purchase request. The certification indicates that funds are available and that a formal reservation of those funds has been made in the amount of the request.
Work Item	See Common PROMIS Terms.

GENERAL RPMBP TERMS

Hard Work	"Hard" work describes tasks within an active project that have an approved schedule and have either adequate funding available or planned and expected funding.
IPM/ACM	The installation project manager (a term identified with military facilities) or account manager is the primary point of contact for that installation or account, serves as an advocate for the customer, determines customers' needs, and communicates these needs to District staff.
Multiple Funding Account Method	Under this method, the user would fund each work item from both the Federal and non-Federal funding accounts in the same proportions as the appropriate cost split percentage. Multiple PR&Cs, or PR&Cs with multiple line items would be required. Funding would also have to be expended proportionately (i.e. don't expend federal funds first, then non-federal funds after).
Organizational Listing	The organizational listing contains the names and pertinent data of each employee within each selected organization. This information is located in the CEFMS database and populates the Resource Sheet in MS Project when a user performs a workload analysis through the local database. This way, a user can choose an employee from a drop down box listing instead of manually typing in personnel data.
PMBP	The Project Management Business Process is an integration of many business processes used by each COE District and describes how all work is to be executed within defined boundaries set by the PMBP Teams and the Division and District Commanders.
Program Manager	The Program Manager maintains a program level focus and ensures that funding consideration and policy requirements are implemented.
Progressing a Project	A project manager progresses a project by updating the information in the databases and files that are part of that project. Such actions may include revising budgets, resources, schedules, or milestones in PROMIS, and managing funds distribution across multiple work items in CEFMS. Progressing a project ensures that accurate and current information is available to Headquarters, Project Review Boards (PRBs), Branch and Section Chiefs, Project Team Members, and/or Customers.
Project Manager	Project managers oversee individual projects that comprise an account.
Project Study Plan (PSP)	The PSP is a management plan that covers project scope, schedule, and budget, and includes a technical analysis, recommendations, and documentation. The PSP is prepared by the project team under the leadership of the project manager. This process should ensure that each organization that provides a technical service can meet the technical requirements of the project within the defined scope, schedule, and budget. The PSP represents the initial plan to execute the next phase of the project.
Resource Leveling	Resource leveling is a process where organizations assign work to its individuals in a balanced way so as to minimize both indirect time and overtime (i.e., maximizing resource usage), while preserving scheduled dates. Sometimes resource leveling will require that organizations either acquire additional work during periods of excess resource capacity, or request labor assistance from other organizations during periods of excess workload.

Senior Project Manager	Senior project managers can oversee individual projects that comprise an account, and provide oversight of project managers who work on projects from one or more different accounts. A senior project manager may step in on behalf of a project manager to address specific project issues.
Single Funding Account Method	Under this method, the user would fund each work item from either the Federal funding account or a non-Federal funding account, except for AE or CN contracts which may need multiple funding accounts to generate sufficient funds.
Soft Work	"Soft" work describes tasks within an active project that are scheduled and are expected to likely occur, but the effort is dependent on the receipt of either additional information, external events such as the receipt of a directive, authorization, customer approval, or signing of an agreement.
Standard Operating Procedures (SOPs)	The District PMBP Team developed SOPs to guide how work is to be performed in the business environment of the District. These SOPs were approved by the District Colonel and are located in the PMBP User Manual.
Workload Analysis	Workload analysis is an analytical process where the total amount of committed work is compared to the total amount of resources to determine if either a resource over-capacity or excess workload exist (i.e. some people need work, or not enough people are available to perform the existing work).
Workload Listing	The workload listing, which resides in the PROMIS database, contains for the selected organization the collective set of all project tasks it was assigned and loaded into PROMIS. This information populates the PROMIS Task Sheet in MS Project when a user performs a workload analysis through the local database. This way, a user can choose a task from this listing instead of manually typing in project task data.
Workload Update	After performing an initial workload analysis, a user may choose to update the project task information that populates the PROMIS Task Sheet in MS Project. Performing an update causes new tasks for that selected organization to be automatically entered into the Task Sheet, deleted tasks to be indicated as such, and changed information, such as budget or schedule dates, to be changed within the appropriate columns.

WBS TASKS – CIVIL MINIMUM TEMPLATE

Construction Phase	<p>During this phase, the DDRs are completed, the P&Ss are modified as appropriate, and engineering considerations and instructions are prepared for field personnel. Additional tasks here include reviewing selected contractor submittals, attending preconstruction conferences, conducting site visits, and preparing construction foundation and concrete reports. Other plans and reports can be prepared here including those covering reservoir filling, embankment surveillance, and HTRW considerations. Support must be provided here for contract claims and modifications, development of O&M or OMRR&R manuals, emergency actions plans, and the review of as-built drawings. The minimum template (with template item codes) requires that three tasks be included:</p> <p>1) P&S/Contract Award (WI000), 2) Construction Placement/Supervision and Administration (WK000), and 3) Project Closeout/Turnover (Y0000).</p>
Feasibility Phase and Report	<p>The purpose of this phase is to formulate solutions to address specific public needs. This work will include studying potential solutions, evaluating costs and benefits, preparing initial designs, and recommending problem solving plans. This phase can include hydrology and hydraulic studies, data development for the environmental assessment, preliminary designs, collection of surveying and mapping information, identifying and designing utilities and facilities proposed for relocation, identifying improvements required for the disposal of dredged or excavated materials, acquiring geotechnical and HTRW data, designing project alternatives, evaluating structural, electrical, and mechanical designs, developing construction procedures, identifying construction procedures, and identifying O&M (OMRR&R) (JH000) requirements and costs. The minimum template (with template item codes) requires that five tasks be included: 1) baseline conditions (J0000), 2) plan formulation (JJ000), 3) Selected Plan (JM000), 4) Environmental Impact Statement Report (EIS) (JD000), and 5) Preconstruction Engineering Design (PED) agreement (Q0000).</p>
General Reevaluation Report	<p>Project reformulation may require a General Reevaluation Report (GRR) (R0000) and tasks of the Feasibility Phase be repeated. The minimum template (with template item codes) requires that five tasks be included: 1) baseline conditions (RA000), 2) plan formulation (RI000), 3) Selected Plan (RK000), 4) Report/EIS (RD000), and 5) a PED agreement (RE000).</p>
Limited Reevaluation Report	<p>Project reformulation may require only a Limited Reevaluation Report (LRR) (R0000) and some tasks of the Feasibility Phase are repeated. The minimum template (with template item codes) requires that three tasks be included: 1)baseline conditions (RA000), 2) analysis (RB000), and 3) report (RJ000).</p>

<p>Preconstruction Engineering Design (PED) Phase</p>	<p>During this phase, the design is finalized, the plans and specifications (P&S) are prepared, and the construction contract is prepared for advertising. This phase begins when the major subordinate command (MSC) Commander issues the public notice for the feasibility report and PED funds are allocated to the district. The minimum template (with template item codes) requires that three tasks be included: 1) a Design Documentation Report (DDR) (T0000), 2) Construction Contract (CC) Plans and Specifications (W0000), and 3) an executed Project Cooperation Agreement (PCA) (KD000). Project reformulation may require a General Reevaluation Report (GRR) (R0000). DDRs may require an Independent Technical Review (ITR) (TH000). A value engineering report (X0000) may be required for projects with costs over \$2 million.</p>
<p>Reconnaissance Phase and Report</p>	<p>This phase begins with the appropriation of funds and ends with either the signing of the Feasibility Cost Sharing Agreement (FCSA), a decision that no Federal interest exists, or the failure to identify a cost sharing partner. The four objectives of this phase are to: 1) determine that the problem(s) warrants Federal participation in feasibility studies, 2) define the Federal interest based on a preliminary appraisal, 3) prepare a Management Plan (PSP), and 4) assess the level of interest from other entities. The Project Delivery Team (PDT) should perform the following general scope: 1) define the engineering and other efforts required for the feasibility phase, 2) identify potential HTRW and/or other environmental concerns, 3) develop conceptual designs with reasonable estimates of cost, and 4) support negotiating the FCSA and the Management Plan (PSP). The minimum template (with template item codes) requires that three tasks be included: 1) the preparation of a 905(b) analysis (A0000), 2) a project study plan (PSP) (I0000), and 3) an FCSA (H0000).</p>

WBS TASKS – MILITARY MINIMUM TEMPLATE

Construction Procurement Products Phase	During this phase, the design is packaged into an appropriate request for proposal (RFP), the RFP is put out to bid, the bids are received, opened, and reviewed, the contractor is chosen and awarded the contract, and the contractor is given a notice to proceed. Activities during this phase can also include meetings with the chosen contractor and the evaluation of bid bonds. The three minimum template tasks (with the template item codes) for this phase include: 1) the Invitation for Bid (IFB) Advertising Notice (54000), 2) the Bid Opening (58000), and 3) the Construction Contract Award (5A000), with the Notice to Proceed to the Contractor.
Construction Products Phase	This phase includes all those activities and events that are part of actually constructing the approved design. The Current Working Estimate, that is, the most up-to-date budget estimate of the project as entered by the Resident Engineer into the Resident Management System (RMS), includes contract costs, variances, contract modifications, supervision and administration (S&A), additional engineering work after contract award, the management reserve, a contingency, and other financial data that has a bearing on the total cost of the project. This phase can include any meetings during construction, subcontractor communications and reports, Quality Control/Quality Assurance (QA/QC) plans, Health and Safety (H&S) Plans, punch lists, the completion of as-built drawings, warranties and permits, and the Beneficial Occupancy agreements and dates. Within the WBS, these tasks fall under the 60000 coding. The minimum template tasks (with the template item codes) for this phase include: 1) Construction Management During Construction (62000), including S&A activities, and 2) the Construction Management (CM) Property transfer (DD 1354) (622F0), with the Beneficial Occupancy Date (BOD) as a required milestone.
Design Phase	During this phase, an Architect/Engineer (AE) design team and the district's in-house (IH) labor as part of the Defense Services Network (DSN) proceed with the design of the project. The design is brought from concept through the final version and then is ready to advertise (i.e. put out to bid). The five minimum template tasks (with the template item codes) for this phase include: 1) DSN AE Notice to Proceed (33800), 2) DSN IH Notice to Proceed (34500), 3) the Concept Design Phase (35%) (42000), 4) the Final Design Phase (95%) (44000), and 5) the Ready to Advertise Phase (100%) (45000). Any additional activities that are required to bring an AE team and/or in-house labor on-board the project, such as negotiations, conferences, or scope reviews, would be performed during this phase (30000). In addition, any additional activities that are required to design the project, such as producing and reviewing plans and drawings, would be performed during this phase (40000).

Fiscal Closeout Products Phase	This phase includes those activities and products required to handle any claims against the project and fiscally close it. These activities can include claims, appeals, depositions, trials, disputes and their resolutions, final payments, and review of issues regarding AE liability. The closing of financial accounts on the project would be the last activity. The minimum template requires only that these tasks fall under Fiscal Closeout Products (70000) .
Planning Phase	This phase includes planning activities under Program and Project Management Products which includes the completion and approval of the Project Management Plan (PMP) Documents (00000/10000). Elements of preparing the PMP include developing the scope of work, developing a work breakdown structure (WBS), defining responsible organizations, developing an acquisition plan, schedules, budgets and cost estimates, a funding plan, and developing other plans related to value engineering, quality, and safety. Any investigations that are required before designing the project are performed as part of this phase (20000). Acquisition plan elements include beneficial occupancy requirements, site design requirements, building design requirements that need special expertise, building functional requirements that need special designer experience, design and construction industry interest and experiences in nontraditional designing and building, and infrastructure capabilities (e.g. water, sewer, etc.). The minimum template requires that three tasks (with the template item codes) be identified: 1) Program/Project Management Products (00000), 2) Project Management Plan Documents (10000), and 3) the Approved PMP (01400) .

WBS TASKS – HTRW MINIMUM TEMPLATE

AE Services	During this subphase (C2000), activities include choosing AE firms to investigate the subject property and possibly lead a later remedial action, supervising those firms, and closeout of contracts/delivery orders. This subphase (with template item codes) includes those activities related to the normal procurement of an AE firm, including a pre-placed contract delivery order (C2100), and those activities related to using a pre-placed contract procurement method (C2200). The minimum template requires the C2000 template item code to be used for AE Services.
Construction Procurement (Remedial Action Contract Award Products)	During this subphase (C5000), a remediation contractor is selected. Activities (with template item codes and minimum template tasks bolded) include data processing equipment procurement (C5100), justifying a sole source for the work (C5200), BCO certification (C5300), CBD announcements (C5400) , advanced notice to bidders (C5500), IFB/RFP package (C5600), reproduced documents (C5700), IFB/RFP distribution (C5800), amendments to the bid documents (C5900), evaluation of bids (C5B00), award of contract (C5G00) , and notice to proceed with the work (C5K00) .
Investigation and Design	This phase includes all those activities and events that are part of moving an HTRW project to the point of real estate acquisition for a remedial action, the remedial action, and the project close-out. Elements of this phase that are described below include Project Management, AE Services, PA/SI, RI/FS, RD, and procuring a contractor. Investigation and Design carries a template item code of C0000.
Post-RA and Fiscal/Financial Closeout	This phase (E0000) includes those activities and products required to monitor the property following remedial action and fiscally close the project. These activities can include operations and maintenance planning documents (E1000), post-remedial action operation, maintenance, and monitoring (E2000) such as additional sampling of site media, and the development of fiscal/financial closeout products (E3000). The minimum template requires the E0000 template item code to be used for post-remedial close out.
Preliminary Assessment/Site Inspection (PA/SI)	Because of the wide range of methods involved in a PA/SI, a User can choose many different template item codes, depending on the type and complexity of fieldwork. Investigations (C3000), and its children tasks and template item codes, refer to a wide range of possible activities. These tasks (with template item codes) can include work plans (C3300), records research (C3400), field investigations (C3500), laboratory analyses (C3600), data evaluation findings (C3700), and possibly modeling (C3800). The minimum template requires the C3000 template item code to be used for the PA/SI, although a more detailed code usage is recommended.

Project Management	This subphase (with template item codes) includes initial and general project management activities (C1000) such as preparing a project management plan (C1100), identifying data maintenance and reporting formats and requirements (C1200), identifying management directives (C1300), identifying, confirming, and negotiating customer and interagency agreements (C1400), acquiring project authorization documents (C1500), developing programming and budget documents (C1600), and establishing project-related rewards (C1700). The minimum template requires the C1000 template item code to be used for project management.
RA (Construction)	During this phase (D0000), the remedial action, or construction, is performed. Activities (with template item codes and minimum template tasks bolded) include work agreements which detail the actual action (D1000) , value engineering change proposals (D2000), engineering during construction (D3000) , supervision and administration (D4000) , and modifications and contingencies during the remedial action (D4F00).
Real Estate Acquisition for RA	During this phase (F0000), real estate is acquired or controlled prior to the initiation of the remedial action. Activities (with template item codes) include planning documents (F1000), acquisition documents (F2000), condemnation documents (F3000), leasing documents (F4000), appraisal documents (F5000), rights-of-entry (F7000), and disposal documents (FA000), to name a few. The minimum template requires the F0000 template item code to be used for acquiring real estate.
Remedial Design	During this subphase (C4000), activities (with template item codes and minimum template tasks bolded) include developing partnering agreements (C4100), acquiring project support products and services (C4200), the conceptual design phase (5-10% complete) (C4300) through the pre-final design phase (90-95% complete) (C4600) , and the final design phase (100% complete) (C4700) . Design phases generally include analysis reports, plans and drawings, specifications, cost estimates, manual development, and design reviews and comments.
Remedial Investigation/ Feasibility Study (RI/FS)	Much like a PA/SI, a wide range of methods involved in an RI/FS can cause a User to choose many different template item codes, depending on the type and complexity of fieldwork. Investigations (C3000), and its children tasks and template item codes, refer to a wide range of possible activities. These tasks (with template item codes and minimum template tasks bolded) can include work plans (C3300), records research (C3400), field investigations (C3500), laboratory analyses (C3600), data evaluation findings (C3700), modeling (C3800), risk assessment reports (C3900), draft and final investigation reports (C3B00 and C3C00) , special reports (C3D00), and decision documents (C3E00) , such as a Record of Decision (ROD) which chooses the remediation method.

SOURCES

1. Army Corps of Engineers Booklet on Construction S&A for Military Projects.
2. Army Corps of Engineers' "Engineering Design for Civil Works Projects", Engineer Regulation 1110-2-1150, dated 31 August 1999.
3. Army Corps of Engineers' "Lost Design", Engineer Regulation 1110-3-111, dated 16 March 1992.
4. Army Corps of Engineers Memorandum on USACE Construction Supervision and Administration Management Policy for DoD Construction Support, CEMP-ZA (415-1-16), dated June 1997.
5. Army Corps of Engineers' "Architect-Engineering Contracting", Engineer Pamphlet 715-1-7, dated 31 May 1999.
6. Army Corps of Engineers Web Sites, 1999-2000.
7. CEFMS User Manual, Army Corps of Engineers, 1999.
8. Design-Build Instructions (DBI) for Military Construction, Army Corps of Engineers, 29 October 1994.
9. Managing With Microsoft Project 98, by Lisa A. Bucki, Prima Publishing, 1998.
10. Microsoft Project 98 Step By Step, Microsoft Press, 1997.
11. PMBP User Manual, Army Corps of Engineers, Sacramento District and Luster National, May 1999.
12. PROMIS on-line help pages.
13. "Ticket to PROMIS" manual, USACE, Vicksburg, MS.

Regional Project Management Business Process

LIST OF ACRONYMS

1 February 2000

2101	Schedules of Obligations and Expenditures
AAPB	Advance Acquisition Procurement Board
ACM	Account Manager
ACO	Administrative Contracting Officer
ACWP	Actual Cost of Work Performed
AE, A/E	Architect/Engineer
AMSCO	AMPERS System Code
ASA (CW)	Assistant Secretary of the Army (Civil Works)
B	Baseline Version
BA	Budget Analyst
BAC	Budget At Complete/Completion
BCOE	Biddability, Constructability, Operability and Environment Certification
BCWP	Budgeted Cost of Work Performed
BCWS	Budgeted Cost of Work Scheduled
BOC	Board of Commanders
BOD	Beneficial Occupancy Date
BY	Budget Year
BY+1	Budget Year + 1
BY-1	Current Year
C	Current Version

Regional Project Management Business Process

LIST OF ACRONYMS

CAP	Continuing Authorities Program
CC	Construction Contracts
CEAP	Corps of Engineers Automated Processing
CEFMS	Corps of Engineers Financial Management System
CERAMMS	Corps of Engineers Resource Allocation Manpower Management System
CG	Construction General
CM	Construction Management
CMR	Command Management Review
COE	Corps of Engineers
COOP	Continuity of Operations Plan
COR	Contracting Officer's Representative
CPI	Cost Performance Index
CV	Cost Variance
CW	Civil Works
CWE	Current Work Estimate
CWIN	Civil Works Identification Number
CWIS	Corps Work Item Schedule
DA	Design Agent
DDR	Design Documentation Report
DOE	Department of Energy
DPM	Deputy for Programs and Project Management

Regional Project Management Business Process

LIST OF ACRONYMS

DSN	Defense Services Network
DSN AE	Defense Services Network Architect Engineer
DSN IH	Defense Services Network In-house
EAC	Estimate at Complete
EIS	Environmental Impact Study/Statement
EQ	Environmental Quality
ESFO	Environmental Support for Others
EVA	Earned Value Analysis
EVPM	Earned Value Project Management
F	Forecast
FAD	Funding Authorization Document
FCSA	Feasibility Cost Sharing Agreement
FORCON	Force Configuration
FS	Feasibility Study
FTE	Full Time Equivalency
FUDS	Formerly Used Defense Sites
FUDSMIS	Formerly Used Defense Sites Management Information System
FWI	Funded Work Item
FY	Fiscal Year
FY+1	Fiscal Year + 1
FY+2	Fiscal Year + 2

Regional Project Management Business Process

LIST OF ACRONYMS

G&A	General and Administrative
GI	General Investigations
GI/CG	General Investigation/Construction General
GRR	General Reevaluation Report
H&S	Health and Safety
HQ	Headquarters
HQUSACE	Headquarters United States Army Corps of Engineers
HTRW	Hazardous, Toxic, Radioactive Waste
IAG	Inter Agency Agreement
IFB	Invitation for Bid
IGE	Independent Government Estimate
IH	In-house
IM	Information Management
IMO	Information Management Office
IPM	Installation Project Manager
ITR	Independent Technical Review
LCMIS	Life Cycle Management Information System
LRE	Latest Revised Estimate
LRR	Limited Reevaluation Report
MILCON	Military Construction
MNS	Mission Needs Statement

Regional Project Management Business Process

LIST OF ACRONYMS

MOA	Method of Accomplishment
MSC	Major Support Command
NA	Not Applicable
NAS	Network Analysis System
NEPA	National Environmental Policy Act
NTP	Notice to Proceed
O&M, OM	Operations and Maintenance
OMA	Operations and Maintenance, Army
OMAF	Operations and Maintenance, Air Force
P&S	Plans and Specifications
PA	Preliminary Assessment
PAT	Project Action Team
PCA	Project Cooperation Agreement
PDT	Project Delivery Team
PED	Preconstruction Engineering Design
PES/PRB	Project Executive Summary/Project Review Board
PM	Project Manager
PMP	Project Management Plan
POC	Point of Contact
PPDS	Programs and Project Delivery System
PPM	Programs and Project Management

Regional Project Management Business Process

LIST OF ACRONYMS

PR&C	Purchase Request and Commitment
PRB	Project Review Board
PRGM	Program Manager
PRISM	Project and Resource Information System for Managers
PROMIS	Project Management Information System
PSP	Project Study Plan
PY	Prior Year
QA	Quality Assurance
QC	Quality Control
QCP	Quality Control Plan
RA	Remedial Action
RD	Remedial Design
RE	Real Estate
RFC	Request for Comments
RFI	Request for Information
RFP	Request for Proposal
RI	Remedial Investigation
RIF	Reduction in Force
RMB	Regional Management Board
RMS	Resident Management System
ROD	Record of Decision

Regional Project Management Business Process

LIST OF ACRONYMS

RPMBP	Regional Project Management Business Processes
RTA	Ready To Advertise
S&A	Supervision and Administration
S&I	Supervision and Investigation
SA	System Administrators
SDP	System Decision Paper
SES	Senior Executive Service
SFO	Support for Others
SFO/WFO	Support for Others/Work for Others
SI	Site Inspections
SOAR	Single Organization All Resources (report)
SOS	Scope of Services
SOSR	Single Organization Single Resource (report)
SPA	US Army Corps of Engineers, Albuquerque District
SPAR	Single Project, All Resources (report)
SPD	US Army Corps of Engineers, South Pacific Division
SPI	Schedule Performance Index
SPK	US Army Corps of Engineers, Sacramento District
SPL	US Army Corps of Engineers, Los Angeles District
SPN	US Army Corps of Engineers, San Francisco District
STD/SR	Single Technical Division, Single Resource

Regional Project Management Business Process

LIST OF ACRONYMS

SV	Schedule Variance
TI	Technical Indirect
TLM	Total Labor Multiplier
USACE	US Army Corps of Engineers
VECP	Value Engineering Change Proposal
VTC	Video Teleconferencing Conference
WAD	Work Authorization Document
WBS	Work Breakdown Structure
WFO	Work For Others
WI	Work Item
WIC	Work Item Code
WRDA	Water Resources Data Act

Online Guide Navigation Instructions

Documents prepared in Portable Document Format (PDF) can be viewed using Adobe Reader. Adobe Reader is software available free as a download from the Adobe web site: www.adobe.com. It is available to anyone who needs to read documentation published in PDF format.

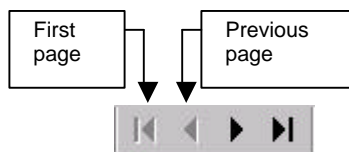
Adobe documents can be displayed two ways, either as a full screen view identical to the printed page or in a split screen view. The split screen view has a pane on the right for viewing the PDF document and a navigation pane on the left which provides links to the major topics of the project.

The Acrobat tool bar shown below provides everything you need to read and navigate through PDF documents. You can “hover” the cursor over any of the tools and its description will be displayed.



Some of the tools are not needed to read the document. Instead they provide options for zooming in to or out of the text, for positioning the page on the screen, for moving from page to page or to a specific page.

The tools that are available to you depend upon several factors, such as where you are in the document. For example, the tools in the screen shot below are displayed when you are at the top of the document. Notice that the first page tool and the previous page tool are not available. You are already on the first page and there is no previous page. If you were anywhere else in the document, the first page tool and the previous page tool would be displayed.



The intent of this guide is to provide an overview of the options available to you in Adobe Reader and to identify each of the tools available for your use. Tools which are not described are not needed to view or navigate in Adobe Reader.



Opens a file. If you know the file name, you can open it using this tool, but generally, you will click on links (Adobe calls them “bookmarks”) to open a file.



Prints the document. You can print the current page, a page range, or the entire PDF file. You can print one or more copies. The print dialog box is the standard Windows dialog

box you are familiar with. You can change printers or print to a file. The print quality is excellent.



Click once to switch between “full page” and “bookmark and page” view.



The hand tool allows you to adjust the page up or down and side to side on your screen. Click and hold the hand tool down and slide it in any direction to reposition the page. This will not affect the original document in any way.



The magnifying glass zooms in to the current portion of the screen. Click the magnifying glass first, then click on the page. The page zooms larger. You can click again and again to zoom larger. To reverse the direction of the zoom, hold down the Ctrl key and click on the magnifying glass one or more times.



Click on the text tool to draw a box around text you want to select and copy out into another document. Then select Edit, Copy from the menu bar. Move to the document location where you want to copy the text and paste it using standard Windows paste keystrokes.



This tool moves you to the top of the document.



This tool moves you to the previous page.



This tool moves you to the next page.



This tool moves you to the last page.



This tool moves you to the previous view. It corresponds to the Back button on the Internet menu bar.



This tool moves you to the next view. It corresponds to the Next button on the Internet menu bar.



This tool displays the page actual size.



This tool fits the page in the window.



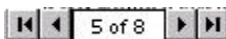
This tool fits the width of the page in the window. Some of the page may not be displayed. Use the vertical scroll bars to view the rest of the page.



The binoculars represent **Find**. You can search by the parameters shown in the following dialog box. Enter the search text in the box. You can enter one word or a long phrase. If desired, you can click in one or more of the checkboxes to direct the search or you can leave all of the checkboxes blank. Press [Enter] or click on [Find] to start the search. The search begins at the current position in the document. The search will find the first occurrence of your search text. The **Match Whole Word Only** option limits the search to exactly what you typed as a word. For example, the search would NOT find “scie” even though the word “scientific” was in the file, because “scie” is not a word. The **Match Case** option limits the search to the capitalization exactly as you typed it. If you typed “APPLE” or “Apple” and only the word “apple” existed in the file, the search would not find it. The **Find Backwards** option searches from the current position of the cursor up toward the top of the file.



If the search text is found, the **Find Again** tool becomes available. If you want to find the next occurrences of the value in the **Find What** field, click on the binoculars/arrow tool. Repeat as needed. You can also execute this function by right clicking and selecting the option from the shortcut menu.




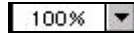
You can use the arrow keys to move to the first page, previous page, next page, or last page.

To go to a specific page in the document, select all of the text in the white box, for example, select “5 of 8”. Then type in a page number and press [Enter].

Saving a file off the internet. Open the file you want to save and select File, Save from the menu bar. Select a destination directory and click OK.

Zoom options: You can change the size that a page is displayed. Here are some tips:

- ◆ If the file is displayed in **Bookmarks and Page** view, you can click on the  tool to switch to only the **Page** view. This makes the page easier to read and does not affect the original document.
- ◆ At the bottom of the screen, you will see a white box indicating the current zoom level. You can click on the dropdown arrow and select another zoom percentage from the list. (Note: Try 125%.) You can also change the zoom by selecting an option from the View menu.



- ◆ Most of the options provided by tools are also available from the menus. The menus have additional options not available as tools.